



2015

Alberta
AlbertaWorks

Applications Management Consulting Ltd.

Calgary & Area
Labour Market

Annual Review

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Calgary's economy contracted by 2.4 per cent in 2015, following robust growth of 5.1 per cent in 2014.

CALGARY

Among the Conference Board of Canada's 28 major Census Metropolitan Areas (CMAs), the Calgary CMA's economy was the hardest hit in 2015.

Following robust growth of 5.1 per cent in 2014, real gross domestic product (GDP) in the Calgary CMA declined by 2.4 per cent in 2015, the first contraction since 2009.

The Calgary economy is forecast to contract by a further 1.2 per cent in 2016 before returning to positive growth of 1.8 per cent in 2017.

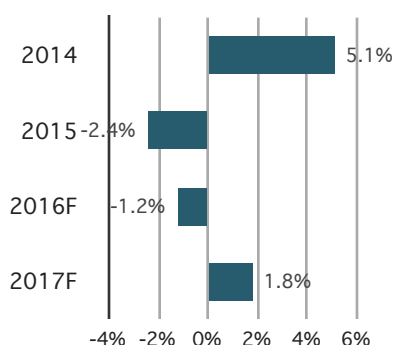
ALBERTA

Alberta's economy contracted by 2.9 per cent in 2015, following strong growth of 4.5 per cent in 2014. Energy companies continued to layoff workers and cut capital spending in the final quarter of 2015, as oil prices fell further to an average of \$US37 per barrel in December. In 2015, 116 Alberta employers informed the provincial government of group layoffs. Over 17,500 Albertans were affected by the group layoffs, up substantially from 2014 when the government received 35 notices affecting 7,500 people. The Alberta economy is forecast to contract a further 1.1 per cent in 2016.

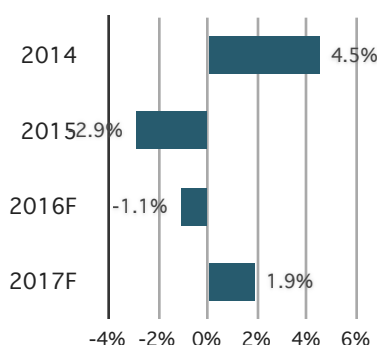
CANADA

Canada started the year with two consecutive quarters of economic contraction. In the third quarter of 2015, real GDP grew at a healthier annualized rate of 2.4 per cent, but slowed to just 0.8 per cent in the final quarter. Overall, real GDP advanced just 1.2 per cent in 2015, down from 2.5 per cent in 2014 – the weakest increase since 2009. Looking ahead, forecasters expect growth to come in around 2.0 per cent through 2017 – consistently below U.S. growth.

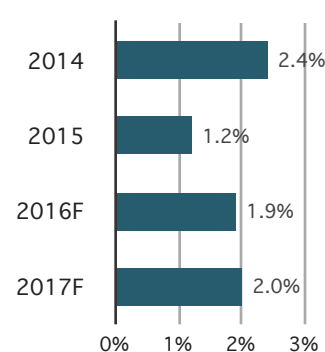
Calgary GDP Growth



Alberta GDP Growth



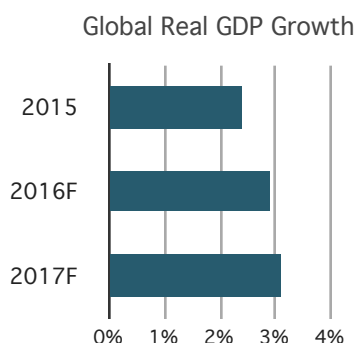
Canada GDP Growth



The global growth outlook is characterized by a continued slowdown in emerging economies, with China's downturn putting downward pressure on trade and commodity prices. The U.S. economy is powering up; and the Euro Area is slowly and divergently recovering.

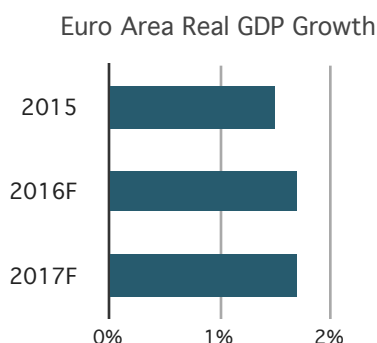
GLOBAL GROWTH

Global economic growth averaged a disappointing 2.4 per cent in 2015, down from 2.6 per cent in 2014. The low reading was mainly a reflection of slowing growth across key emerging economies, low commodity prices impacting revenues for exporters, diminished investment flows, subdued trade, and bouts of financial market volatility. The fourth quarter was characterized by further economic deceleration in major emerging markets, notably China, and a slight pickup across most advanced economies.



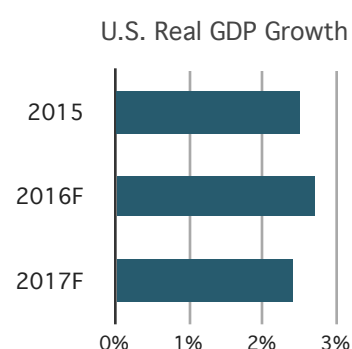
EURO AREA

The slowdown across many major emerging markets, an additional bailout for Greece following its election, the ongoing Russia-Ukraine conflict, and the large influx of migrants from the Middle East played a role in limiting growth in the euro area late in 2015. Positive fourth quarter developments that should act to encourage growth in 2016 and 2017 included a steadily declining overall unemployment rate in the region, along with a 3-year, €300 billion spending program undertaken by the European Commission to stimulate investment.



U.S.

Despite weak estimated GDP growth of just 0.7 per cent in the fourth quarter, the U.S. was among the best performing advanced economies in 2015. A highlight of the U.S. economy was its strengthening labour market, which late in the fourth quarter prompted the Federal Reserve to increase its overnight interest rate for the first time in seven years. While the overall growth outlook remains relatively moderate in the 2 to 3 per cent range, this is in stark contrast to a very fragile and uncertain global economic climate.



The average number of unemployed people in the Calgary CMA increased from 42,300 in 2014 to 55,600 in 2015, pushing the unemployment rate up from 5.0 per cent in 2014 to 6.4 per cent in 2015.

CALGARY

The average number of unemployed people in the Calgary CMA increased from 42,300 in 2014 to 55,600 in 2015, pushing the unemployment rate up from 5.0 per cent in 2014 to 6.4 per cent in 2015.

Calgary's employment rate (the percentage of the working age population that is employed) fell to an average of 69.1 per cent in 2015, from 69.7 per cent the previous year. Despite the decline, the Calgary CMA had the second highest employment rate among the largest CMAs in Canada in 2015, following Regina (69.6 per cent).

ALBERTA

Alberta had an average of 148,000 unemployed people in 2015, up 36,300 or 32.5 per cent from 2014. The province's unemployment rate rose to an average of 6.0 per cent in 2015, up from 4.7 per cent the previous year. In December 2015, Alberta's unemployment rate hit 7.0 per cent, a rate not seen since April 2010.

Alberta's labour force grew by 63,000 or 2.6 per cent in 2015. At 73.0 per cent, the province had the highest participation rate in Canada in 2015, significantly higher than the national average of 65.8 per cent. Alberta's participation rate has been above 70 per cent since 1980.

CANADA

Canada's unemployment rate remained unchanged at an average of 6.9 per cent in 2015.

Saskatchewan had the lowest average unemployment rate among provinces in 2015 at 5.0 per cent, followed by Manitoba (5.6 per cent) and Alberta (6.0 per cent).

The Conference Board of Canada projects Canada's unemployment rate to rise to 7.0 per cent in 2016, before declining to 6.6 per cent in 2017.

Labour Force Survey Stats 2015	Calgary	Alberta	Canada
✓ Participation Rate	73.8%	73.0%	65.8%
✓ Employment Rate	69.1%	68.6%	61.3%
✓ Unemployment Rate	6.4%	6.0%	6.9%

CALGARY

Employment in the Calgary CMA rose for the fifth consecutive year in 2015, increasing by 16,300. In 2015, the Calgary CMA accounted for 62 per cent of the net new jobs created in Alberta. Despite the year-over-gains, employment in the Calgary CMA declined throughout most of the second half of 2015.

Employment in the Calgary CMA is forecast to decline by 2.1 per cent in 2016.

ALBERTA

Employment in Alberta also grew for the fifth consecutive year in 2015, increasing by 26,500 or 1.2 per cent. In 2015, Alberta accounted for 18 per cent of the net new jobs created nationally.

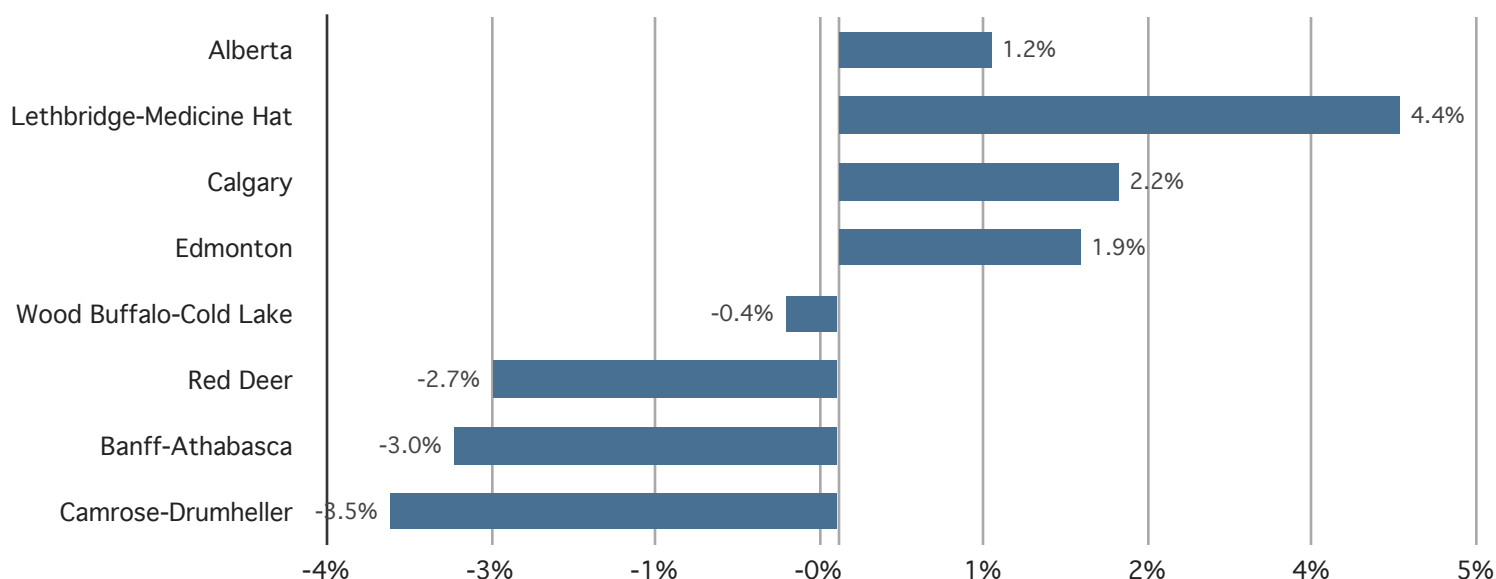
Looking ahead, employment in Alberta is forecast to decline by between 1.4 per cent (RBC) and 2.2 per cent (CIBC) in 2016.

CANADA

Despite the struggles the Canadian economy faced in 2015, the nation experienced more positive employment growth than it did in 2014. Employment in Canada rose by 144,400 or 0.8 per cent in 2015, up from an increase of 111,100 or 0.6 per cent in 2014.

Employment in Canada is forecast to increase by 0.9 per cent in 2016 and by 1.3 per cent in 2017. Growing investment in the business and public sectors is projected to accelerate employment growth in 2017.

Annual Change in Employment by Economic Region in Alberta, 2015



These are the industries that posted the greatest annual change in employment in Calgary, Alberta and Canada in 2015.

Calgary Highlights

Health Care and Social Assistance	Transportation and Warehousing	Construction	Prof., Scientific and Technical Services
+13,800 jobs	+6,300 jobs	-7,400 jobs	-6,100 jobs

Alberta Highlights

Health Care and Social Assistance	Educational Services	Forestry, Fishing, Mining, Oil and Gas	Prof., Scientific and Technical Services
+23,500 jobs	+13,300 jobs	-19,600 jobs	-11,100 jobs

Canada Highlights

Health Care and Social Assistance	Educational Services	Other Services	Forestry, Fishing, Mining, Oil and Gas
+72,600 jobs	+37,200 jobs	--33,300 jobs	-17,700 jobs

Survey Results: The 802 employers surveyed in 2015 employed approximately 161,000 people.

PAST GROWTH

On balance, 3 per cent of the employers said their company expanded in the year prior to their survey. This is down significantly from the 2014 results, when 15 per cent of the employers on balance reported their company expanded.

Results varied by company size and industry, but were most positive among large-sized employers and employers in the health care and social assistance industry.

FUTURE GROWTH

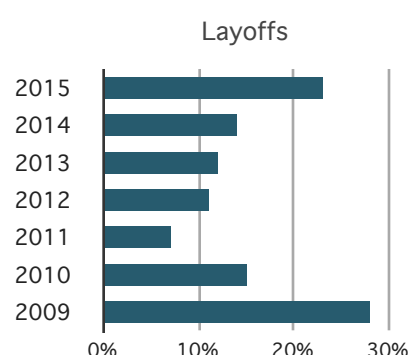
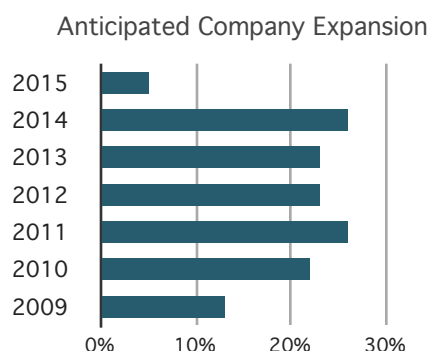
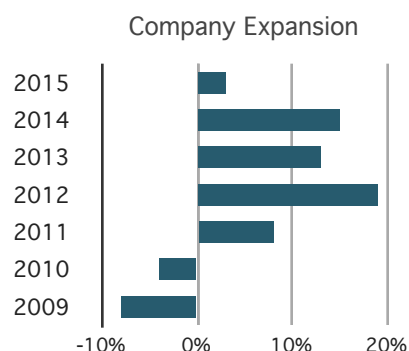
On balance, only 5 per cent of employers anticipated a business expansion in the 12 months following their survey, down significantly from 26 per cent in 2014.

Employers surveyed in 2015 reported a substantially lower rate of anticipated company expansion than in all previous years. The change in 2015 could indicate that companies are less optimistic because of current economic conditions.

LAYOFFS

Twenty-three per cent of employers reported that they laid off workers in the 3 months prior to their survey, the highest level since 2009.

Overall, employers surveyed in 2015 reported about 3,660 people were laid off, representing a layoff rate of 2.3 per cent. The mining and oil and gas industry had the highest layoff rate at 11.7 per cent, followed by construction (9.3 per cent).



The most frequently reported vacant positions were program leaders and instructors in recreation, sport and fitness, nurse aides, orderlies and patient service associates, and registered nurses.

The positions employers reported the most difficulty recruiting were truck drivers, food counter attendants and kitchen helpers, and cooks.

The positions employers reported had the highest voluntary turnover were truck drivers, community and social service workers, construction trades labourers and food and beverage servers.

Sixty-six per cent of employers reported approximately 11,910 employees left as a result of voluntary turnover in the 12 months prior to their survey. Overall, the voluntary turnover rate was 7 per cent in 2015.

PAST RECRUITMENT

Employers were asked if they had difficulty recruiting qualified employees in the 12 months prior to their survey. Thirty-eight per cent of employers reported difficulty recruiting, down from 47 per cent in 2014.

FUTURE RECRUITMENT

Employers were asked if they anticipated having more, less or the same difficulty recruiting qualified employees in the 12 months following their survey. In 2015, on balance, 22 per cent anticipated less difficulty recruiting.

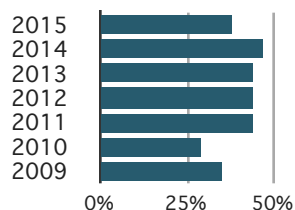
PAST TURNOVER

Employers were asked if they had any voluntary turnover in the 12 months prior to their survey. Sixty-six per cent of employers reported voluntary turnover, down only slightly from 68 per cent in 2014.

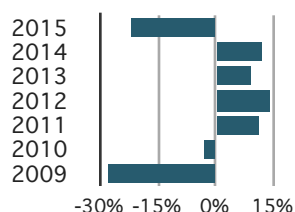
FUTURE TURNOVER

Employers were asked if they anticipated voluntary turnover would be higher, lower or the same in the 12 months following their survey. On balance, 15 per cent anticipated voluntary turnover would be lower.

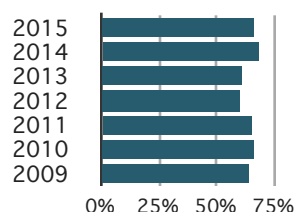
Past Difficulty Recruiting



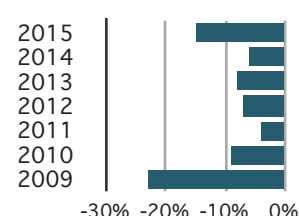
Future Difficulty Recruiting



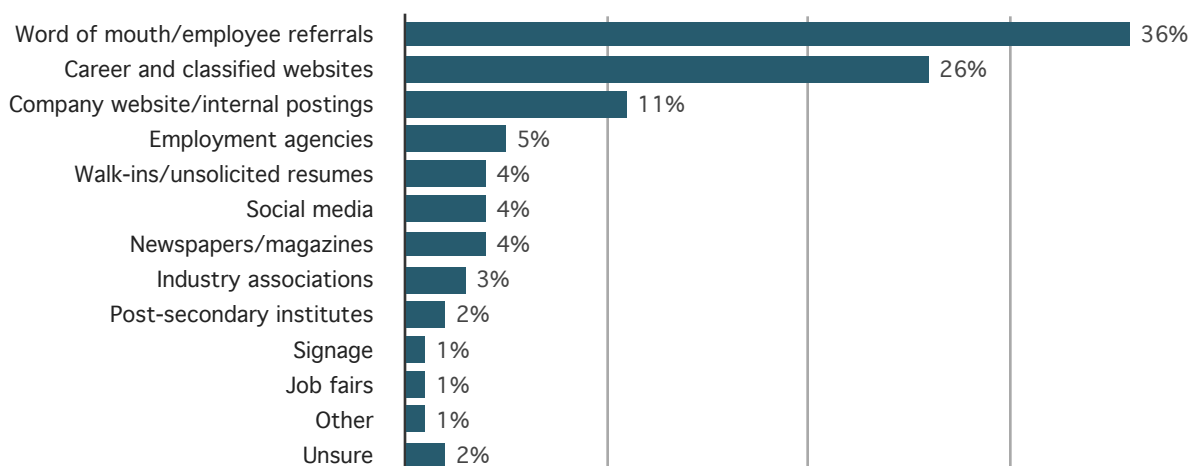
Past Turnover



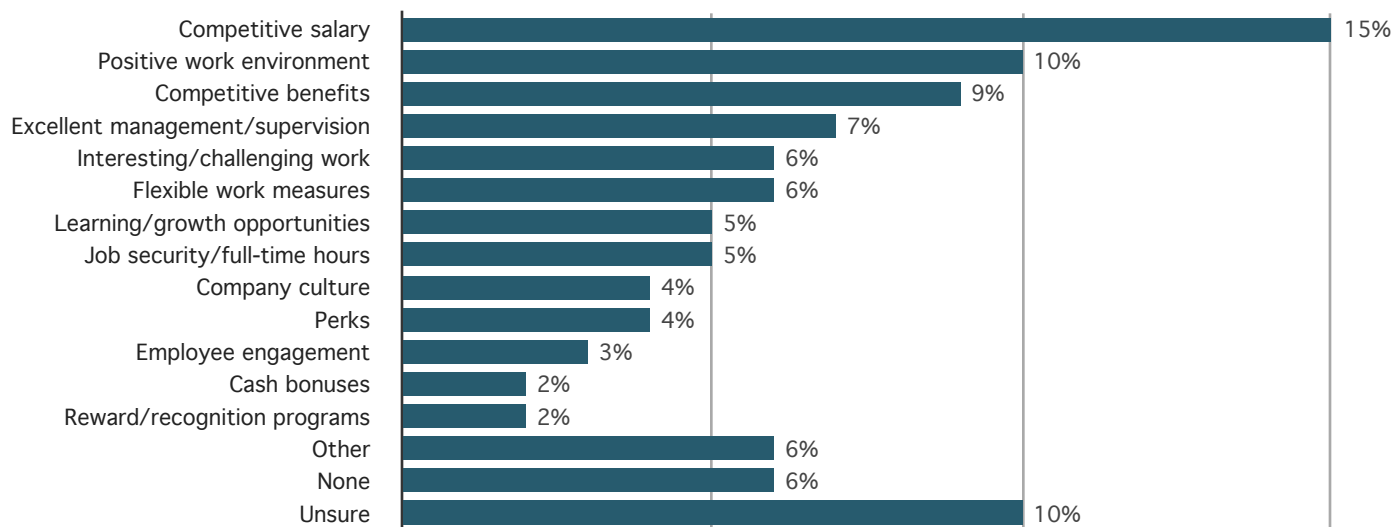
Future Turnover



- ✓ Employers reported word of mouth/employee referrals and career and classified websites were the most successful recruitment resources for attracting workers in the 12 months prior to their survey.



- ✓ Employers reported providing a positive work environment and excellent management/supervision were the most successful employee retention strategies in the 12 months prior to their survey.



The Calgary region economy is affected by global and U.S. economic activity and by economic drivers in the Canadian economy and elsewhere in Alberta.

Calgary Region Economy

Among the Conference Board of Canada's 28 major Census Metropolitan Areas (CMAs), the Calgary CMA's economy was the hardest hit in 2015.

Following robust growth of 5.1 per cent in 2014, real gross domestic product (GDP) in the Calgary CMA declined by 2.4 per cent in 2015, the first contraction since 2009.

“Not surprisingly, given their close ties to the energy sector, the primary and utilities sector and manufacturing were two of the hardest hit industries last year, with the construction industry also posting a significant decline.”¹

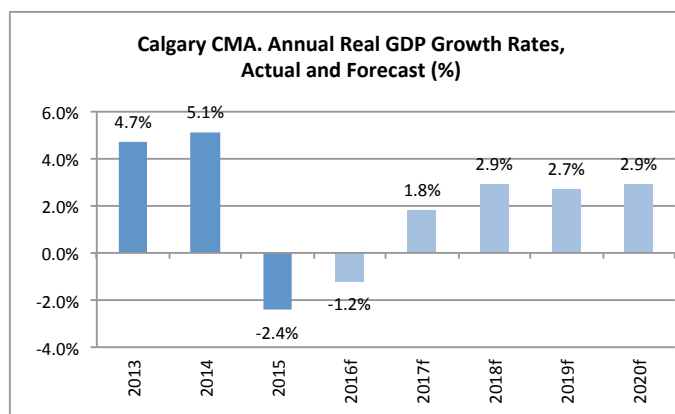
Five other major CMAs recorded economic contractions in 2015, including St. John's (-0.1 per cent), Regina (-0.3 per cent), Greater Sudbury (-0.8 per cent), Saskatoon (-0.9 per cent) and Edmonton (-1.8 per cent).

Vancouver's economy grew by 3.9 per cent in 2015 - outpacing all other CMAs in Canada.

The Calgary economy is forecast to contract by a further 1.2 per cent in 2016 before returning to positive growth of 1.8 per cent in 2017.²

The key contributory influences on the Calgary region economy are described below.

- **Inflation:** Consumer prices in the Calgary CMA rose by a more modest 1.2 per cent in 2015, following a 3.0 per cent increase in 2014. Five major metropolitan areas in Canada had higher rates of inflation than Calgary in 2015 including Saskatoon (1.9 per cent), Toronto (1.5 per cent) and Montreal, Winnipeg and Regina (1.4 per cent each).³ Calgary's inflation rate is forecast to average 1.8 per cent in 2016 and 2.1 per cent in 2017.⁴



Source: Conference Board of Canada, Metropolitan Outlook 1, Winter 2016.

¹ The Conference Board of Canada, Metropolitan Outlook 1, Winter 2016, p.4.

² Ibid.

³ Statistics Canada, CANSIM table 326-0021.

⁴ The Conference Board of Canada, Metropolitan Outlook 1, Winter 2016.

- ▶ **Housing Market:** Housing starts in the Calgary CMA reached 13,033 units in 2015, down 24 per cent compared to the previous year. Single-detached starts were down 36 per cent from 2014 to 4,138 units, while multi-family starts declined 16 per cent to 8,895 units. Despite the year-over-year decline, 2015 marked the second highest number of total annual starts for the Calgary CMA since 2007 (2014 was a record year for housing starts). During the last recession in 2009, total housing starts in the Calgary area dropped to 6,318 units.⁵

Residential sales in the Calgary CMA totaled 23,994 in 2015, down 29 per cent from 33,615 sales in 2014.⁶ The average price for an existing home in the Calgary CMA was \$453,814 in 2015, down 1.5 per cent compared to 2014.⁷ For the City of Calgary, existing home sales totaled 18,830 in 2015, down 26 per cent from 2014. Sales are projected to decline a further 2.2 per cent in 2016 to 18,416. The annualized benchmark price for the City of Calgary is forecast to decline 3.4 per cent in 2016 to \$438,652.⁸

- ▶ **Rental Market:** Calgary's apartment vacancy rate jumped to 5.3 per cent in 2015, from 1.4 per cent the previous year, and tied for the highest vacancy rate since 1993.⁹ Calgary had the fourth highest vacancy rate among the major CMAs in Canada in 2015, behind Saint John (8.5 per cent), Saskatoon (6.5 per cent) and Regina (5.4 per cent). The average rental price for a two-bedroom apartment unit in the Calgary CMA rose 0.8 per cent to \$1,332 per month in 2015, from \$1,322 per month in 2014. Among the major CMAs in Canada, Calgary had the second highest average rent for a two-bedroom apartment, behind Vancouver (\$1,368). Saint John (\$718), Montreal (\$760) and Quebec (\$788) had the lowest average rental prices in 2015.
- ▶ **Non-Residential Building Construction:** Investment in non-residential building construction in the Calgary CMA rose 11.6 per cent year-over-year to \$4.43 billion in 2015. Investment in commercial buildings increased 5.0 per cent to \$3.47 billion, institutional and governmental building investment jumped 64 per cent to \$763 million and industrial building investment edged up 1.6 per cent to \$198 million. Calgary ranked third in terms of total investment in non-residential building construction among major metropolitan areas in Canada in 2015, behind Toronto (\$10.20 billion) and Montreal (\$5.40 billion).¹⁰
- ▶ **Downtown Office Market:** Calgary's overall downtown office vacancy rate continued to rise in 2015, increasing to 16.4 per cent at the end of 2015 from 8.2 per cent at the end of 2014. The vacancy rate in Calgary's Class A downtown office market rose over 12 percentage points year-

⁵ Calgary Herald, Calgary region housing starts down from previous-year levels, Mario Toneguzzi, January 11, 2016.

⁶ Canada Mortgage and Housing Corporation, Housing Now Tables Calgary CMA, January 2016, p.26.

⁷ Ibid.

⁸ Calgary Real Estate Board, 2016 Economic Outlook and Regional Housing Market Forecast, January 2016, p.4.

⁹ Canada Mortgage and Housing Corporation, Rental Market Report Calgary CMA, Fall 2015, p.2.

¹⁰ Statistics Canada, CANSIM table 026-0016.

over-year to 19.8 per cent in the final quarter of 2015. *“2015 was a year for the record books. Due to the prolonged downturn in the energy sector and continued uncertainty, companies flooded the downtown market with sublease space leading Calgary into its single largest year of negative absorption ever totalling 2,571,481 square feet.”*¹¹

Rental rates dropped significantly at the end of 2015, particularly in the sublease sector. Year-over-year, rental rates for Class AA downtown sublease space declined from an average of \$37 per square foot (psf) at the end of 2014 to \$23 psf at the end of 2015, while rates for Class A sublease space dropped from \$25 psf to just \$8 psf. For Class B and C sublease space in downtown Calgary, rental rates fell from an average of about \$14-\$15 psf in 2014 to around \$2-\$5 psf in 2015.¹²

Looking ahead, with four new office developments to hit the market by 2018 [Oxford’s Eau Claire Tower, Manulife’s 707 Fifth, Brookfield Place - East, and Telus Sky], Cresa projects the office vacancy rate in downtown Calgary to continue to rise, reaching a peak of about 21 per cent in 2018. *“From a real estate perspective there is always a lag in the recovery of office demand behind a rebound in energy prices. Even if we see more sustainable energy prices come the end of the year, it could be another 12-18 months before the office market starts to materially change. Given the amount of inventory that will need to be absorbed to bring the office market into balance, it is challenging to expect material relief in the next two years in the downtown office market.”*¹³

- **Population:** Calgary’s population increased by 35,700 or 3.0 per cent from the previous year to 1.231 million in 2015. Natural increase accounted for 30 per cent of the population increase in 2015 (10,800 people) while net migration accounted for the remaining 70 per cent (24,900 people).¹⁴ Calgary’s population is forecast to increase by 135,600 over the next five years, reaching a total of 1.367 million by April 2020. Over this period, net migration is expected to account for 58 per cent of the population growth (78,000) while natural increase is forecast to account for the remaining 42 per cent (57,600).¹⁵

As the population ages and net migration slows, the age distribution of Calgary’s population is projected to shift over the next five years. The 35 - 39 age group (+24,000) and 45 - 49 age group (+19,800) are expected to experience the largest increases, while the population of the 20 - 24 age group is forecast to decline by 4,200 over the five years to 2020. In addition, the population of the 25 - 29 age group will remain relatively unchanged (+200).¹⁶

¹¹ Cresa, Point of View, Fourth Quarter 2015, Downtown and Beltline Office Market Report, p.1.

¹² Ibid.

¹³ Ibid, p.2.

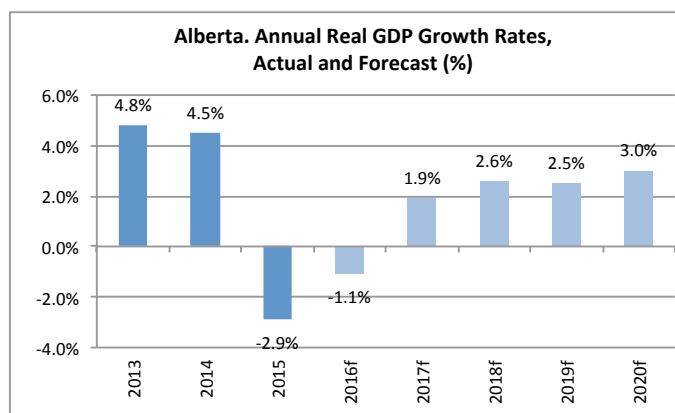
¹⁴ City of Calgary, 2015 Civic Census Results.

¹⁵ City of Calgary Economics, Calgary & Region Economic Outlook 2015 - 2020, Fall 2015, p.11.

¹⁶ Ibid.

Alberta Economy

Alberta's economy contracted by 2.9 per cent in 2015, following strong growth of 4.8 per cent and 4.5 per cent in 2013 and 2014 respectively. Energy companies continued to layoff workers and cut capital spending in the final quarter of 2015, as oil prices fell further to an average of \$US37 per barrel in December. In 2015, 116 Alberta employers informed the provincial government of group layoffs. Employers are required to provide the government four weeks' notice of their intention to layoff 50 or more employees at a single-location within a four-week period. Over 17,500 Albertans were affected by the group layoffs, up substantially from 2014 when the government received 35 notices affecting 7,500 people. Over three-quarters of the group layoffs in 2015 involved terminations in the oil and gas sector and related businesses.¹⁷



Source: Conference Board of Canada, Metropolitan Outlook 1, Winter 2016.

The economic downturn in Alberta is expected to be more protracted than previously forecast,¹⁸ and the Conference Board of Canada now projects real GDP in the province to contract by 1.1 per cent in 2016.¹⁹

The Alberta government's third quarter 2015 fiscal update also forecasts Alberta's economy to contract by 1.1 per cent in 2016.²⁰ The last time Alberta experienced two consecutive years of economic decline was in 1982-83.

"The steep decline in oil prices means that the downturn in Alberta's economy will be deeper and longer than forecast at Budget [2015]. [...] Weaker economic conditions continue to weigh on incomes, including wages and salaries, corporate profits, and Government of Alberta revenue. [...] Though the outlook for 2016 has deteriorated, there are some factors that remain supportive of growth. Oil sands output will continue to expand, driving exports. As costs moderate, a lower Canadian dollar will support non-energy exports and boost revenue. Increased public capital spending will help offset some of the declines in private sector investment."²¹

¹⁷ Job Bank, Job Market Trends and News, Alberta.

¹⁸ The Conference Board of Canada forecasted growth of 1.2 per cent for the Alberta economy in the Autumn 2015 Provincial Outlook.

¹⁹ Conference Board of Canada, Metropolitan Outlook 1, Winter 2016.

²⁰ Government of Alberta, 2015-16 Third Quarter Fiscal Update and Economic Statement, February 2016,

²¹ Ibid, p.12.

The key drivers of the Alberta economy are summarized below.

- ▶ **Energy:** The price of West Texas Intermediate (WTI) crude oil started the year at an average of US \$47 per barrel in January 2015. Prices peaked in June at close to US\$60 per barrel, but deteriorated in the second half of 2015, dropping to about US\$37 per barrel in December. In 2015, WTI crude prices averaged US\$49 per barrel, down from an average of US\$93 per barrel in 2014. Western Canada Select (WCS) prices, the Canadian heavy oil benchmark, averaged US\$35.30 per barrel in 2015, down from US\$73.60 the previous year.²² The WCS-WTI differential narrowed to an average of US \$13.50 per barrel in 2015, from US\$19.40 in 2014. PIRA Energy Group, in their March 2016 North American Midcontinent Oil Forecast, projects a WCS differential for the remainder of 2016 of approximately US\$13 per barrel.²³

A glut of oil is projected to keep crude prices from rebounding in the near term. For 2016, major Canadian banks and the U.S. Energy Information Administration (EIA) estimate the price of WTI will fall within the range of US\$37-US\$42 per barrel. For 2017, the price of WTI crude is forecast to average US\$45-US\$59 per barrel.²⁴ The Alberta government's third quarter 2015 fiscal update revealed that lower energy royalties and reduced tax revenue are expected to increase the provincial deficit from \$6.1 billion to \$6.3 billion for the fiscal year ending in March 2016. The province projects investment in the oil and gas sector to decline by a further 20 per cent in 2016, after a steep decline in 2015. *"Oil and gas investment is expected to contract by over 20% in 2016, sharper than the 4.2% decline expected at Budget [2015]. The continued slump in oil prices has caused energy companies to cut spending further. Conventional oil and gas investment has slowed considerably, with the number of rigs drilling falling to multi-decade lows. Spending in the oil sands will be limited to maintenance of existing facilities and the completion of projects that were under construction prior to the price decline. Firms will continue to seek ways of cutting costs by bargaining aggressively with suppliers and containing labour costs. Some consolidation within the industry is likely, as firms with healthy balance sheets acquire those under financial stress."*²⁵

Crude oil production in Alberta increased 5.3 per cent in 2015 to 168.3 million cubic metres. Production of crude bitumen (oil sands), which makes up about half of all crude oil production in the province, increased 15 per cent to 80.9 million cubic metres. Production of synthetic crude rose 2.3 per cent in 2015, while light and medium crude production and heavy crude production declined 11 and 8.6 per cent respectively.²⁶ Energy companies in western Canada will continue to boost production over the next five years. Western Canadian crude oil production is forecast to increase

²² Baytex Energy Corp. Historical Oil Pricing.

²³ Baytex Energy Corp. Q1 2016 Heavy Oil Pricing Update, April 5, 2016.

²⁴ Scotia Global Forecast Update (highest value in the range), Feb 1, 2016; US EIA Short Term Energy Outlook, Feb 9, 2016; BMO Commodity Forecast, Feb 23, 2016; TD Commodity Price Report, Feb 19, 2016.

²⁵ Government of Alberta, 2015-16 Third Quarter Fiscal Update and Economic Statement, February 2016, p.13.

²⁶ Statistics Canada, CANSIM table 126-0001.

from 3.68 million barrels per day (b/d) in 2015 to 3.83 million b/d in 2016, according to the latest forecast from the Canadian Association of Petroleum Producers (CAPP).²⁷

In 2015, the number of active drilling rigs in western Canada declined to an average of 184, from 370 in 2014, representing a 50 per cent decline. Rig utilization dropped to 24 per cent in 2015, from 46 per cent in 2014.²⁸ The Canadian Association of Oilwell Drilling Contractors (CAODC) projects the number of active drilling rigs in western Canada to decline to an average of 159 in 2016, while rig utilization is forecast to fall to 22 per cent.²⁹ *“Clearly, the 2016 outlook— for our members and the entire oil and gas industry— is challenging. Amid consolidations, insolvencies, and thousands of layoffs, oil and gas services companies will continue to struggle to provide jobs for Canadians, and tax revenues and royalties for governments in a rapidly changing global marketplace. CAODC members in particular are looking at some of the lowest operating days and utilization rates in our 65 year history.”*³⁰

- ▶ **Building Permits:** Alberta builders were issued a total of \$16.8 billion in building permits in 2015, an 8.0 per cent decrease from 2014. The value of residential permits declined 8.8 per cent in 2015 to \$9.9 billion, while the value of non-residential permits fell 7.4 per cent to \$6.93 billion. In 2015, Alberta accounted for 20 per cent of the \$85.1 billion worth of building permits issued in Canada.³¹
- ▶ **Housing Market:** Housing starts in Alberta reached 37,500 units in 2015, a 7.4 per cent decrease from 2014. Alberta housing starts are forecast to decline 18 per cent in 2016 to 30,800 units and by an additional 4.2 per cent in 2017 to 29,500 units.³²

The number of existing homes sold in Alberta dropped 21 per cent in 2015 to 56,500 units. The average resale price in Alberta declined 2.1 per cent to \$391,400 in 2015. Existing home sales are forecast to decline a further 21 per cent in 2016 to 44,600 units with the average resale price projected to decline 4.8 per cent to \$372,800.³³

- ▶ **Rental Market:** Alberta’s apartment vacancy rate rose to 5.6 per cent in 2015, from 2.1 per cent in October 2014. Reduced income growth and job prospects have contributed to lower demand for rental housing in the province. Among Alberta’s largest urban centres, Edmonton (4.2 per cent) and Medicine Hat (4.6 per cent) had the lowest vacancy rates in 2015. Wood Buffalo posted the highest

²⁷ Canadian Association of Petroleum Producers, Crude Oil Forecast, Transportation and Marketing, June 2015,

²⁸ CAODC, Rig Counts - By Quarter, <http://www.caodc.ca/rig-counts-drilling-dr-quarter>

²⁹ CAODC State of the Industry, 2015 Review & 2016 Forecast, November 2015.

³⁰ Ibid, p.10.

³¹ Statistics Canada, CANSIM table 026-0006.

³² TD Economics, Provincial Economic Forecast, April 5, 2016.

³³ Ibid.

vacancy rate at almost 30 per cent, up significantly from 11.8 per cent in 2014.³⁴ The average rental price for a two-bedroom apartment in Alberta rose to \$1,253 per month in 2015, from \$1,238 per month one year prior. Among the province's largest urban centres, Wood Buffalo had the highest average rent for a two-bedroom apartment at \$1,841 per month, but this was down significantly from \$2,118 per month in 2014. Medicine Hat (\$828 per month) and Lethbridge (\$919 per month) had the lowest average rent for a two-bedroom apartment in 2015.³⁵

- ▶ **Retail Sales:** Retail sales in Alberta fell by an estimated 3.7 per cent in 2015, following robust growth of 7.5 per cent the previous year. Retail sales also contracted by 2.9 per cent in Saskatchewan in 2015. *"After leading the nation in year over year retail sales growth over the 2011-2014 period, Alberta and Saskatchewan are both expected to see negative growth for 2015, finishing 9th and 10th [out of 10] in Colliers' Provincial projections, respectively - a complete reversal of 2010 to 2014 retail growth rankings. [...] Alberta and Saskatchewan's move to the bottom of the rankings coincides with the WTI plunge, which in turn yielded negative impacts on production, employment, and ultimately consumer confidence and retail spending."*³⁶ TD Economics is forecasting retail sales in Canada to advance 3.3 per cent in 2016. British Columbia is forecast to lead retail sales growth in 2016 (+6.9 per cent), while Alberta is projected to be the only province to record a decline (-4.1 per cent).³⁷
- ▶ **Average Weekly Earnings:** The average weekly earnings of Alberta payroll employees declined 0.3 per cent year-over-year to \$1,146 in 2015. Throughout 2015, Alberta continued to record the highest average weekly earnings across all provinces, and was 20 per cent higher than the national average of \$952. Employees in Alberta's mining and oil and gas extraction industry had the highest average weekly earnings in 2015 at \$2,164, down from \$2,195 in 2014, while employees in the accommodation and food services industry had the lowest average weekly earnings at \$410, down from \$427 in 2014.³⁸
- ▶ **Business Bankruptcies:** Ninety-five Alberta businesses filed for bankruptcy in 2015, down from 105 businesses in 2014. Nationally, business bankruptcies also declined, from 3,116 in 2014 to 3,089 in 2015. Fifty-five per cent of the business bankruptcies in Canada in 2015 were in Quebec, while Alberta businesses accounted for just 3.0 per cent of the bankruptcies.³⁹

³⁴ Canada Mortgage and Housing Corporation, Rental Market Report, Alberta Highlights, Fall 2015, p.3.

³⁵ Ibid.

³⁶ Colliers International, National Retail Report Canada, Fall 2015 Edition, p.5.

³⁷ TD Economics, Provincial Economic Forecast, April 5, 2016.

³⁸ Statistics Canada, CANSIM table 281-0063.

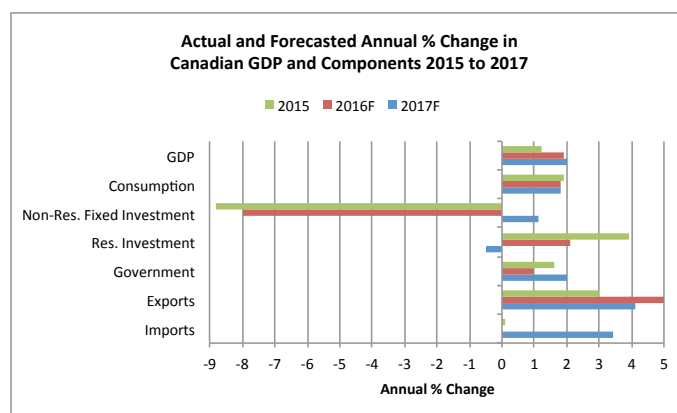
³⁹ Office of the Superintendent of Bankruptcy Canada, Insolvency Statistics in Canada.

- ▶ **Employment Insurance:** The average number of Albertans receiving regular Employment Insurance (EI) benefits in 2015 increased 67 per cent to 50,427 from 30,242 in 2014. Nationally, the average number of EI beneficiaries rose just 5.0 per cent to 533,9058 over the same period.⁴⁰ Forty-one per cent of EI beneficiaries in Alberta in 2015 were in trades, transport and equipment operator occupations, 13 per cent were in business, finance and administrative occupations and 12 per cent were in sales and service occupations.⁴¹
- ▶ **Population:** Alberta's population increased by 72,300 or 1.7 per cent in 2015 to an estimated 4.23 million as of January 1, 2016. Net interprovincial migration was estimated at 16,800 in 2015 and accounted for 23 per cent of Alberta's annual population increase. In addition, the province welcomed about 21,900 net international migrants over the year, while natural increase (births minus deaths) totaled 33,600. Year-over-year, Alberta's population growth rate of 1.7 per cent in 2015 led all provinces, nearly doubling the national average of 0.9 per cent.⁴²

Canadian Economy

Canada started the year with two consecutive quarters of economic contraction. In the third quarter of 2015, real gross domestic product (GDP) grew at a healthier annualized rate of 2.4 per cent, but slowed to just 0.8 per cent in the final quarter. Overall, real GDP advanced just 1.2 per cent in 2015, down from 2.5 per cent in 2014 – the weakest increase since 2009. Looking ahead, forecasters expect growth to come in below 2.0 per cent through 2017 – consistently below U.S. growth.

“Canada's economy is going through a structural realignment, precipitated by low commodity prices. When taken together with an aging workforce and only modest expected productivity growth, Canadians will need to recalibrate their expectations to the notion that expansions of 2.5-3% are a thing of the past. The economy's trend rate now appears to be closer to 1.5-1.7%.”⁴³



Source: TD Economics, Quarterly Economic Forecast, March 23, 2016.

⁴⁰ Statistics Canada, CANSIM table 276-0022.

⁴¹ Statistics Canada, CANSIM table 276-0041.

⁴² Statistics Canada, CANSIM table 051-0001.

⁴³ TD Economics, Quarterly Economic Forecast, March 23, 2016, p.6.

The key drivers of the Canadian Economy are summarized below.

- ▶ **Consumer Spending:** Growth in consumer spending is expected to decelerate slightly in 2016. Modest employment gains, high debt burdens and rising imported good prices should limit spending growth to below 2.0 per cent in both 2016 and 2017. *“With disposable income and job growth expected to slow, consumers will be hard pressed to increase their current pace of spending. Household debt as a share of income is at a record high, and this will contain growth in household spending to that of disposable income.”*⁴⁴
- ▶ **Business Investment:** Business investment contracted by more than 10 per cent annualized in every quarter of 2015 and will likely continue to decline through the third quarter of 2016. Oil prices are not expected to sufficiently recover to encourage large-scale investment into 2017. *“The manufacturing sector will offer some impetus to investment growth in 2017 under the influence of export growth, but the current low level of capacity utilization suggests that the additional investment is likely to be relatively small in size.”*⁴⁵
- ▶ **Housing:** Overall, Canadian housing starts totaled about 195,000 in 2015 – slightly higher than the 188,000 and 189,000 tallies recorded in 2013 and 2014 respectively.⁴⁶ Looking ahead, forecasters are not optimistic that housing will continue to make significant contributions to growth, even if lending rates remain low. Starts are expected to trend lower in 2016, closer to the 180,000 total associated with demographics-fueled demand.⁴⁷ In 2017, anticipated interest rate hikes will further weigh on demand for new homes.⁴⁸
- ▶ **Fiscal Policy:** Forecasters estimate that, if implemented, the recently elected Liberal government’s fiscal platform could boost real GDP growth by as much as 0.1 and 0.3 percentage points in 2016 and 2017 respectively.⁴⁹ The federal government is expected to pump around \$10 billion into the economy in each of the next two fiscal years through a combination of changes to income tax brackets, infrastructure funding, the Canada child tax benefit, enhanced employment insurance program, and other forms of spending.⁵⁰ Higher expenditures should result in the federal government posting at least four consecutive years of deficits, not reaching a surplus position again until 2019-20.

⁴⁴ Conference Board of Canada, Canadian Outlook – Winter 2016, February 2016.

⁴⁵ Conference Board of Canada, Canadian Outlook - Winter 2016, Begruary 2016,

⁴⁶ BMO Economics, Housing Starts Fall Back to Earth, January 11, 2016.

⁴⁷ Scotia Economics, Canadian Housing Starts Posted Solid 2015, January 11, 2016.

⁴⁸ TD Economics, Data Release: Canadian new home construction ends 2015 with a whimper, January 11, 2016.

⁴⁹ TD Economics, Data Release: Bank of Canada holds policy rate unchanged in face of weaker growth outlook, January 20, 2016.

⁵⁰ Conference Board of Canada, Canadian Outlook – Winter 2016, February 2016.

Unfortunately, even with the planned stimulus at the federal level, real government spending is unlikely to make a large contribution to growth in 2016. Most provincial governments have aimed to tighten their budgets, which will offset the additional spending from Ottawa. *“The Liberal plan [increases spending], but it’s hardly enough to get momentum going in the Canadian economy in 2016. In fact, given the direction that provincial budgets are going, the degree of stimulus will be miles from what we saw in the Great Recession.”*⁵¹

- ▶ **Trade:** In spite of the mixed performance of late, Canada’s trade sector is expected to be one of the few solid contributors to growth in 2016. While total exports are forecast to increase by just 2.5 per cent in 2016, anticipated import growth is a much lower 0.8 per cent.⁵² Export growth should pick up in 2017 to an estimated 3.7 per cent, but rebounding domestic demand will also push import growth to an estimated 2.8 per cent, narrowing the gap and limiting trade’s contribution to GDP.
- ▶ **Interest Rates:** The Bank of Canada lowered the target for the overnight rate to 0.75 per cent in January 2015, from 1.0 per cent in December 2014. In July 2015, the rate was lowered again to 0.50 per cent, where it remained throughout the year. The Conference Board of Canada projects the central bank will leave the overnight rate at 0.50 per cent for another year. *“Canadians will be able to continue to take advantage of low interest rates for a while longer, as current economic conditions mean there is no need for any interest rate hikes at this point. In fact, given the current economic woes, there is a greater chance that interest rates will be cut once again.”*⁵³
- ▶ **Canadian Dollar:** Bank of Canada rate cuts, a stronger US dollar, and lower commodity prices resulted in the Canadian dollar losing over 12 cents against the greenback in 2015. The loonie averaged 78.3 cents US in 2015, down from an average of 90.6 cents US the previous year.⁵⁴ The loonie is forecast to average 71 cents US in 2016 and 77 cents US in 2017.⁵⁵ *“Our forecast expects the loonie to average just US\$0.708 this year, although any further deterioration in oil prices or additional monetary stimulus from the Bank of Canada would put further downward pressure on the loonie. The good news is that the current weakness in the loonie will be transitory. Oil prices are now at a level where many producers are losing money. The low price environment has resulted in a plunge in North American drilling activity, and this should be the catalyst for some reduction in future production. With less oil being produced, prices should gradually recover. The loonie will also slowly appreciate, thanks to the rebound in oil prices, but is expected to remain below US\$0.80 until mid-2018.”*⁵⁶

⁵¹ CIBC Economics, Forecast, December 17, 2015.

⁵² Conference Board of Canada, Canadian Outlook – Winter 2016, February 2016.

⁵³ Ibid.

⁵⁴ www.canadianforex.ca

⁵⁵ Conference Board of Canada, Canadian Outlook – Winter 2016, February 2016.

⁵⁶ Ibid, p.52.

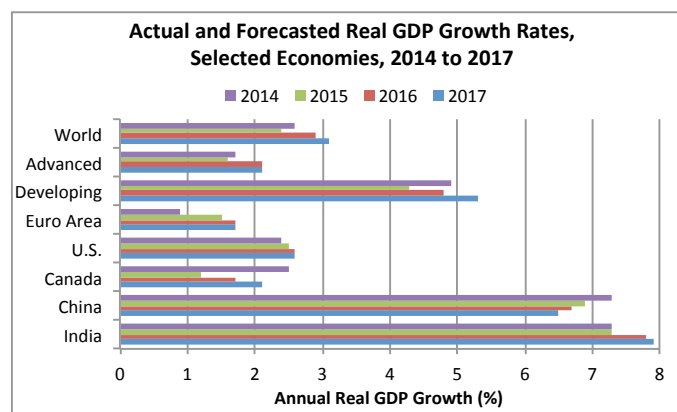
- **Population:** Canada's population increased by 308,100 or 0.9 per cent year-over-year and reached an estimated 35.85 million on July 1, 2015. According to Statistics Canada, this was the lowest population increase since 1999, but the largest among the G7 countries over the most recent comparable annual period.⁵⁷ Net international migration was estimated at 187,400 (down from 257,000 in 2014) and accounted for just over 60 per cent of the population growth in 2015. Natural increase (births minus deaths) was estimated at 120,700 in 2015, down slightly from 129,000 in 2014.⁵⁸

As of July 1, 2015, 16.1 per cent of Canadians were at least 65 years old, marking the first time there were more persons in this age category than children aged 0 - 14 years (16.0 per cent of Canadians). Statistics Canada projects that Canadians aged 65 years and older will account for 20.1 per cent of the population and children aged 0 - 14 years will account for 16.3 per cent of the population in 2024.⁵⁹

Global/U.S. Economy

Despite receiving support from low energy prices and still-accommodative lending conditions throughout many of the world's economies, global growth again fell short of expectations in 2015, decelerating to 2.4 per cent from 2.6 per cent in 2014.⁶⁰ The disappointing result was mainly a reflection of slowing growth across key emerging economies, low commodity prices impacting revenues for exporters, diminished capital flows, subdued trade, and bouts of financial market volatility. Relative to historical growth trends, global economic activity has consistently underperformed over the past few years.

"...Many emerging markets dealt with tumbling currencies and the slowdown in Chinese economic growth. At the same time, Europe and Japan experienced anemic



Source: World Bank, Global Economic Perspectives, January 2016.

⁵⁷ Statistics Canada, The Daily, Canada's population estimates: Age and sex, July 1, 2015, September 29, 2015.

⁵⁸ Statistics Canada, CANSIM table 051-0004.

⁵⁹ Statistics Canada, The Daily, Canada's population estimates: Age and sex, July 1, 2015, September 29, 2015.

⁶⁰ World Bank, Global Economic Perspectives, January 2016.

growth. The global economy has now recorded subpar economic growth for four straight years, with all the world's major regions expanding at a pace well below potential.”⁶¹

One of the major factors influencing the global outlook has been a protracted decline in the price of oil (as well as other commodities, particularly metals). Generally, the low oil price is a reflection of sustained output by Organization of the Petroleum Exporting Countries (OPEC) members amid continued global oil production in excess of consumption.⁶² Relatively weak growth reports from major emerging markets, particularly China, have also led to expectations of reduced global demand for energy.

Lower oil prices strain the fiscal positions of exporters (such as Canada) and weigh on growth prospects. Further, the outlook for heavily leveraged and already-fragile oil producers is threatened – especially if lending conditions tighten. However, lower oil prices also support global demand by reducing business energy costs and increasing real household income. On a net global basis, most forecasters anticipated this positive impact to dominate in 2015, but a number of factors have acted to dampen the support that lower oil prices would typically provide.

“First and foremost, financial strains in many oil exporters reduce their ability to smooth the shock, entailing a sizable reduction in their domestic demand. The oil price decline has had a notable impact on investment in oil and gas extraction, also subtracting from global aggregate demand. Finally, the pickup in consumption in oil importers has so far been somewhat weaker than evidence from past episodes of oil price declines would have suggested, possibly reflecting continued deleveraging in some of these economies. Limited pass-through of price declines to consumers may also have been a factor in several emerging market and developing economies.”⁶³

Moving forward, forecasters anticipate that global economic growth will edge up in 2016 to about 2.9 per cent in 2016 and 3.1 per cent in 2017-18.⁶⁴ However, this pickup is predicated on continued progress in advanced economies, a stabilization of commodity prices, and the gradual and successful rebalancing of the Chinese economy.

- ▶ **Advanced Economies:** The U.S. and U.K. led advanced economies in 2015 with real GDP growth rates of 2.5 and 2.2 per cent respectively.⁶⁵ The euro area recorded modest overall growth with highly divergent performances among its members; while Japan and Canada lagged behind other advanced economies. The majority of advanced economies are expected to post slightly higher growth into 2016 and 2017, with aggregate real GDP increasing to 2.1 per cent from 1.6 per cent in 2015.

⁶¹ Conference Board of Canada, World Outlook, January 2016.

⁶² IMF, World Economic Outlook – Update, January 19, 2016.

⁶³ IMF, World Economic Outlook – Update, January 19, 2016.

⁶⁴ World Bank, Global Economic Perspectives, January 2016.

⁶⁵ Scotia Economics, Global Forecast Update, January 5, 2016.

However, the general ranking of advanced economies is not expected to change, with the U.S. and U.K. continuing to lead, and Japan and Canada posting lackluster growth through the near-term horizon.

- ▶ **Emerging Economies:** In developing countries, growth in 2015 was a post-crisis low of 4.3 per cent, down from 4.9 per cent in 2014.⁶⁶ In a development unprecedented since the 1980s, most of the largest emerging economies have slowed simultaneously for three consecutive years. Among the BRICS economies (Brazil, Russia, India, China, and South Africa), only India has managed to avert a deceleration. Given the size and high degree of global economic integration of these markets, significant negative spillover effects to the rest of the world are likely. Overall, emerging economies are expected to face another challenging year in 2016, with China's slowdown impeding trade growth, commodity prices, and confidence levels. Further, emerging market investment flows and currency values will be dampened as the U.S. continues on its path of interest rate normalization. Nonetheless, aggregate real GDP growth in emerging economies is forecast to pick up to 4.8 per cent and 5.3 per cent in 2016 and 2017 respectively, alongside rising demand in advanced economies.
- ▶ **U.S. Economy:** Early estimates suggested that real GDP in the U.S. economy had increased by a disappointing 0.7 per cent (annualized) in the fourth quarter of 2015 – a significant deceleration relative to 2.0 per cent in the third quarter.⁶⁷ The fourth quarter performance also compared unfavourably to 2015's average pace of real GDP growth in the U.S. economy, which at 2.4 per cent was roughly the same as 2014. However, forecasters are confident that the slowing rate of U.S. growth is temporary and related to factors such as contractions in the oil and gas sector, and the appreciation of the dollar constraining exports amid already weak levels of global demand. Bolstered by a strengthening domestic labour market, relatively low interest rates, and a gradual stabilization of the global economy, economic growth in the U.S. is expected to accelerate to close to 3.0 per cent between 2016 and 2018.⁶⁸ Over the long-term, average annual real GDP growth is forecast to decelerate to about 2.4 per cent through 2035 – attributable to a slowdown in domestic demand as both population and labour force growth decline due to the aging of the baby-boom generation. While the U.S. economy will likely expand at a faster rate than it did during the 2000 to 2010 period, a return to the higher growth of the 1990s is unlikely.
- ▶ **U.S. Labour Market:** One of the strongest aspects of the U.S. economy in 2015 was its labour market, where consistent employment growth provided the impetus for the Federal Reserve to increase its overnight rate late in 2015, ending seven years of near-zero interest rates.⁶⁹ The Fed stressed that the interest rate normalization path would be gradual and dependent upon a further firming of economic conditions, with forecasters anticipating rate increases to reach 1.25 per cent

⁶⁶ World Bank, Global Economic Perspectives, January 2016.

⁶⁷ Bureau of Economic Analysis, Gross Domestic Product: Fourth Quarter and Annual 2015 (Advanced Estimate), January 29, 2016.

⁶⁸ Conference Board of Canada, Long-Term Economic Forecast, 2015.

⁶⁹ BMO Economics, Focus, December 23, 2015.

(from the current position of 0.25 to 0.50 per cent) by the end of 2016.

In 2015, an average of 221,000 jobs were added per month, down from about 260,000 in 2014 but better than any other year since 1999.⁷⁰ By sector, U.S. job growth in 2015 was most pronounced in education and health services (+655,000), professional and business services (+605,000) and leisure and hospitality (+419,000). Only the mining and logging sector (which includes the oil and gas industry) posted a decline over the year (-131,000).⁷¹ The unemployment rate in the U.S. remained unchanged in the final quarter of 2015 at 5.0 per cent, but was down over the course of the year from 5.6 per cent in December 2014.⁷² Forecasters expect that the unemployment rate could fall as low as 4.5 per cent in 2016. Historically slow growth in U.S. demographics should allow for continued employment gains to generate further, significant reductions in the overall rate of unemployment.

⁷⁰ TD Economics, Data Release: No slowing the U.S. job machine, January 8, 2016.

⁷¹ Bureau of Labor Statistics, The Employment Situation – December 2015, January 8, 2016.

⁷² Ibid.

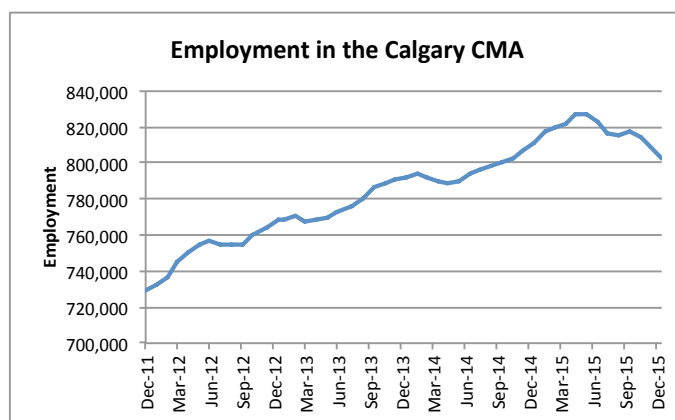
This section examines labour market information for the Calgary Region, Alberta and Canada.

Calgary Census Metropolitan Area (CMA)

Employment

Employment in the Calgary CMA rose for the fifth consecutive year in 2015, increasing by 16,300 or 2.0 per cent. In 2015, the Calgary CMA accounted for 62 per cent of the net new jobs created in Alberta. Despite the year-over-gain, employment in the Calgary CMA declined throughout most of the second half of 2015.

In 2015, Calgary's labour force grew by almost 30,000 people, a result of strong net migration and a higher participation rate. Although Calgary's average annual participation rate rose by 0.4 percentage points to 73.8 per cent in 2015, it slowed to 72.4 per cent in December.



Source: Statistics Canada, CANSIM table 282-0135.

Calgary's employment rate (the percentage of the working age population that is employed) fell to an average of 69.1 per cent in 2015, from 69.7 per cent the previous year. Despite the decline, the Calgary CMA had the second highest employment rate among the largest CMAs in Canada in 2015, following Regina (69.6 per cent). Victoria (58.7 per cent), Saint John (60.3 per cent), Montreal (60.8 per cent) and Vancouver (60.9 per cent) had the lowest employment rates in 2015.

Labour Force Survey Statistics - Calgary CMA

Calgary CMA	2014	2015	Annual Change	Percent Change
Population	1,146,800	1,180,800	34,000	3.0%
Labour Force	841,800	871,400	29,600	3.5%
Employed	799,500	815,800	16,300	2.0%
Unemployed	42,300	55,600	13,300	31.4%
Participation Rate	73.4%	73.8%	0.4%	-
Employment Rate	69.7%	69.1%	-0.6%	-
Unemployment Rate	5.0%	6.4%	1.4%	-

Source: Statistics Canada CANSIM Table 282-0129 – Labour force survey estimates (LFS)

Full-time employment in the Calgary CMA rose by 8,800 or 1.3 per cent in 2015, while part-time employment increased by 7,300 or 5.6 per cent. Both men and women posted increases in employment in 2015, however employment growth for women (+3.1 per cent) outpaced employment growth for men (+1.2 per cent).

The only major age category to record an increase in employment in 2015 was adults aged 25 - 54 years (+23,600 or +4.3 per cent). Employment for youth (15-24 years) in Calgary declined by 3,800 or 3.6 per cent in 2015, while employment for adults aged 55 years and older decreased by 3,500 or 2.4 per cent.

Employment by Type of Work, Gender and Age - Calgary CMA

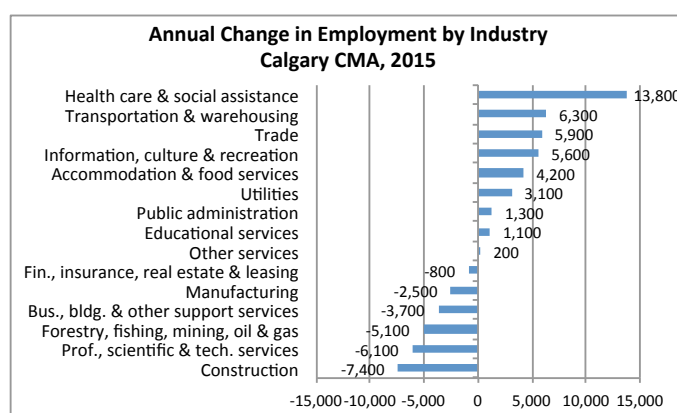
Calgary CMA	2014	2015	Annual Change	Percent Change
Employment	799,500	815,800	16,300	2.0%
Full-time	669,100	677,900	8,800	1.3%
Part-time	130,500	137,800	7,300	5.6%
Men	435,900	441,000	5,100	1.2%
Women	363,600	374,800	11,200	3.1%
15-24 years	106,900	103,100	-3,800	-3.6%
25-54 years	547,200	570,800	23,600	4.3%
55 years +	145,400	141,900	-3,500	-2.4%

Source: Statistics Canada CANSIM Tables 282-0038 and 282-0129 – Labour force survey estimates

In 2015, employment increases in nine industries were offset by losses in six industries. The most significant employment gains in the Calgary CMA were in health care and social assistance (+13,800), transportation and warehousing (+6,300) and trade (+5,900). The construction (-7,400), professional, scientific and professional services (-6,100) and mining and oil and gas industries (-5,100) recorded the most notable employment losses in 2015.

Overall, the Conference Board of Canada has forecasted employment in the Calgary CMA to decline by 2.1 per cent in 2016.⁷³

Employment in Calgary's services-producing sector is forecast to decline by 0.6 per cent in 2016. Growth in business services and finance, insurance and real estate industries is projected to



Source: Statistics Canada, CANSIM table 282-0131.

⁷³ The Conference Board of Canada, Metropolitan Outlook1, Winter 2016.

be offset by employment losses in public administration, wholesale and retail trade and transportation and warehousing. Employment growth is forecast to be relatively unchanged in personal services and non-commercial services.

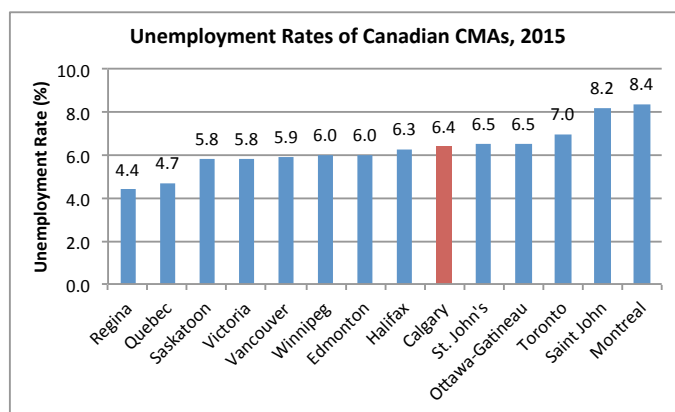
Employment in Calgary's goods-producing sector is projected to decline by 7.0 per cent in 2016, led by manufacturing (-8.9 per cent), primary and utilities (-7.0 per cent) and construction (-5.8 per cent).

Modest employment growth of 1.0 per cent is forecasted for Calgary in 2017.⁷⁴

Unemployment

The average number of unemployed people in the Calgary CMA increased from 42,300 in 2014 to 55,600 in 2015, pushing the unemployment rate up from 5.0 per cent in 2014 to 6.4 per cent in 2015. The unemployment rate for men increased significantly to 7.0 per cent in 2015 from 4.8 per cent in 2014, while the unemployment rate for women increased to 5.6 per cent, from 5.3 per cent in 2014. Among the major age categories, youth aged 15 - 24 years had the highest unemployment rate in Calgary in 2015 at 11.2 per cent, up from 10.1 per cent the previous year.

Calgary had the ninth highest average unemployment rate among 14 major metropolitan areas in 2015. Montreal (8.4 per cent), Saint John (8.2 per cent) and Toronto (7.0 per cent) recorded the highest average unemployment rates, while Regina (4.4 per cent) and Quebec City (4.7 per cent) posted the lowest rates in 2015.



Source: Statistics Canada, CANSIM table 282-0129.

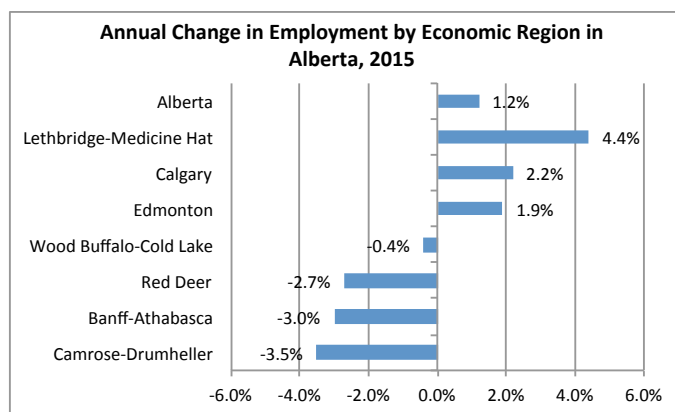
⁷⁴ Ibid.

Alberta

Employment

Employment in Alberta managed to grow for the fifth consecutive year in 2015, increasing by 26,500 or 1.2 per cent. In 2015, Alberta accounted for 18 per cent of the net new jobs created nationally.

“Alberta employment grew by a surprising 1.2% in 2015, given the low oil prices and an average unemployment rate of 6.0%. The annual data, however, masks a year marred by deteriorating conditions. At the beginning of 2015, the market was propped up by momentum from 2014 which dissipated as the year progressed.”⁷⁵



Source: Statistics Canada, CANSIM table 282-0123.

Approximately 70 per cent of the net new jobs created in Alberta in 2015 were in the Calgary economic region. Employment in the Edmonton region increased by 14,800 or 1.9 per cent in 2015, while employment in the Lethbridge-Medicine Hat region rose by 6,200 or 4.4 per cent. Employment fell in the remaining four economic regions in Alberta in 2015, led by a decline of 3.5 per cent in the Camrose-Drumheller region.

Alberta's labour force grew by 63,000 or 2.6 per cent in 2015. At 73.0 per cent, the province had the highest participation rate in Canada in 2015, significantly higher than the national average of 65.8 per cent. Alberta's participation rate has been above 70 per cent since 1980.

Labour Force Statistics - Alberta

Alberta	2014	2015	Annual Change	Percent Change
Population	3,281,800	3,353,800	72,000	2.2%
Labour Force	2,386,200	2,449,200	63,000	2.6%
Employed	2,274,600	2,301,100	26,500	1.2%
Unemployed	111,700	148,000	36,300	32.5%
Participation Rate	72.7%	73.0%	0.3%	-
Employment Rate	69.3%	68.6%	-0.7%	-
Unemployment Rate	4.7%	6.0%	1.3%	-

Source: Statistics Canada CANSIM Table 282-0002 – Labour force survey estimates (LFS)

⁷⁵ Alberta Treasury Board and Finance, Labour Market Notes, February 5, 2016, p.2.

With labour market conditions weakening over the second half of the year, part-time employment in Alberta increased by 14,200 or 3.8 per cent in 2015. Full-time employment rose by 12,300 or 0.6 per cent in 2015. In addition, the majority of the job gains in 2015 were among women, with employment increasing by 20,100 or 2.0 per cent. Employment for men increased by only 6,600 or 0.5 per cent.

Adults aged 55 years and older accounted for close to 70 per cent of the net new jobs created in the province in 2015. Employment for those aged 55 years and older rose by 18,200 or 4.4 per cent, while employment for Albertans aged 25 - 54 years increased by only 8,400 or 0.5 per cent. Employment for youth aged 15 - 24 years was virtually unchanged in 2015.

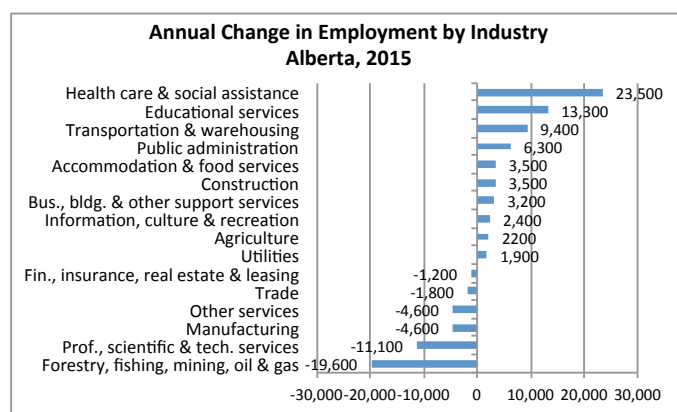
Employment by Type of Work, Gender and Age - Alberta

Alberta	2014	2015	Annual Change	Percent Change
Employment	2,274,600	2,301,100	26,500	1.2%
Full-time	1,898,500	1,910,800	12,300	0.6%
Part-time	376,100	390,300	14,200	3.8%
Men	1,255,900	1,262,500	6,600	0.5%
Women	1,018,600	1,038,700	20,100	2.0%
15-24 years	320,400	320,300	-100	0.0%
25-54 years	1,543,300	1,551,700	8,400	0.5%
55 years +	410,900	429,100	18,200	4.4%

Source: Statistics Canada CANSIM Tables 282-0038 and 282-0038 – Labour force survey estimates

Employment in Alberta's services-producing sector increased by 43,000 or 2.7 per cent in 2015. Within this sector, the health care and social assistance industry had the largest employment increase of 23,500 (+9.8 per cent). Other notable increases included educational services (+13,300 or +10.7 per cent), transportation and warehousing (+9,400 or +7.2 per cent) and public administration (+6,300 or +7.2 per cent). Four industries in the services-producing sector posted employment losses in 2015, including professional, scientific and technical services (-11,100), other services (-4,600), trade (-1,800) and finance, insurance, real estate and leasing (-1,200).

Alberta's goods-producing sector lost 16,500 net jobs in 2015, a decline of 2.5 per cent. The mining and oil and gas industry posted the largest loss in employment in 2015, decreasing by 19,600 or 11 per cent. Employment also declined by



Source: Statistics Canada, CANSIM table 282-0008.

4,600 or 3.2 per cent in the manufacturing industry. Construction employment increased by 3,500 or 1.4 per cent in 2015. A majority of the losses in Alberta's resource extraction industries occurred in the energy services industry, including layoffs at oilfield drilling and maintenance firms. Falling commodity prices continued to negatively impact oil and gas producers and coal mining operations throughout the year.⁷⁶

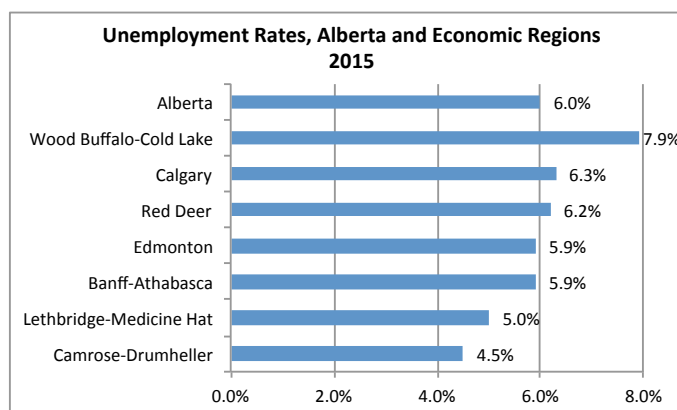
Looking ahead, employment in Alberta is forecast to decline by between 1.4 per cent (RBC) and 2.2 per cent (CIBC) in 2016.⁷⁷

“Strong public-sector hiring helped to offset private-sector layoffs to keep overall employment above year-ago levels in 2015; however, as the unsustainable pace of growth in the former eases and as firms grapple with prevailing crude oil price conditions, additional layoffs are poised to propel overall employment lower in 2016.”⁷⁸

Unemployment

Alberta had an average of 148,000 unemployed people in 2015, up 36,300 or 32.5 per cent from 2014. The province's unemployment rate rose to an average of 6.0 per cent in 2015, up from 4.7 per cent the previous year. In December 2015, Alberta's unemployment rate hit 7.0 per cent, a rate not seen since April 2010.⁷⁹

“As the labour force expanded and employment declined, the unemployment rate steadily climbed from 4.6% in January [2015] to 7.0% by December [2015]. Over the same period, the number of unemployed increased by 58,500 to 171,000. The increase in Employment Insurance (EI) claims and the number of regular EI beneficiaries reflected the large number of lay-offs and higher unemployment.”⁸⁰



Source: Statistics Canada, CANSIM table 282-0123.

Among the economic regions in Alberta, the Wood Buffalo-Cold Lake region had the highest average unemployment rate in 2015 at 7.9 per cent, up from 4.7 per cent the previous year. The Camrose-Drumheller region had the lowest unemployment rate among Alberta's economic regions at 4.5 per cent, up from 3.4 per cent a year earlier.

⁷⁶ Government of Canada Job Bank, Labour Market Bulletin Alberta: December 2015.

⁷⁷ RBC Economics, Provincial Outlook, March 2016, CIBC Economics, Provincial Forecast Update, March 4, 2016.

⁷⁸ RBC Economics, Provincial Outlook, March 2016, p.3,

⁷⁹ Statistics Canada, CANSIM table 282-0087.

⁸⁰ Alberta Treasury Board and Finance, Labour Market Notes, February 5, 2016, p.2.

Alberta's unemployment rate is forecast to average between 7.5 per cent (Scotiabank) and 8.3 per cent (CIBC) in 2016 and between 7.2 per cent (Scotiabank) and 8.2 per cent (CIBC) in 2017.⁸¹

Another measure of the health of the labour market, along with the unemployment rate, is the average duration of unemployment. The average length of unemployment in Alberta increased slightly to 14.6 weeks in 2015, from 14.5 weeks in 2014. At the national level, the average duration of unemployment declined from 20.8 weeks in 2014 to 20.1 weeks in 2015. Saskatchewan (13.2 weeks) and Alberta (14.6 weeks) had the lowest average duration of unemployment in 2015. In contrast, Quebec and British Columbia had the highest figures in 2015 at 24.4 weeks and 20.3 weeks respectively.

The number of long term unemployed persons in Alberta (those who are jobless for 27 weeks or more) jumped to 21,000 in 2015, from 14,200 in 2014, accounting for 14 per cent of the total unemployed in the province. Nationally, the number of long-term unemployed (251,100) made up almost 19 per cent of the total unemployed in 2015.⁸²

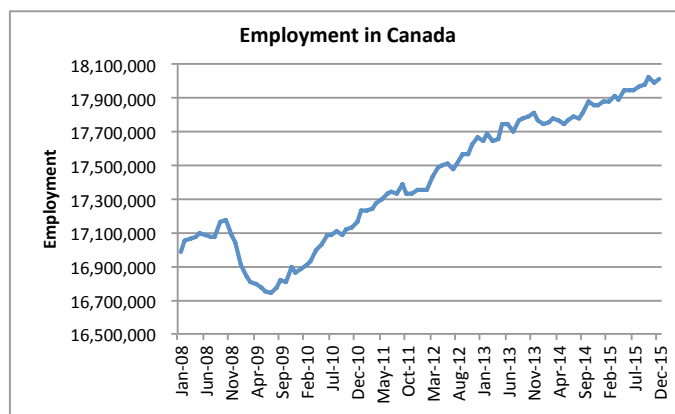
Canada

Employment

Despite the struggles the Canadian economy faced in 2015, the nation experienced more positive employment growth than it did in 2014.

Employment in Canada rose by 144,400 or 0.8 per cent in 2015, up from an increase of 111,100 or 0.6 per cent in 2014. The population aged 15 and older rose by 1.0 per cent in 2015, a faster pace than the labour force (0.8 per cent). As a result, Canada's participation rate declined to 65.8 per cent in 2015 and the employment rate fell slightly to 61.3 per cent.

Among provinces, Manitoba had the highest annual employment growth rate in 2015 at 1.5 per cent, followed by Alberta and British Columbia (1.2 per cent each). Employment declined by 1.1 per cent in Prince Edward Island, by 1.0 per cent in Newfoundland and Labrador and by 0.6 per cent in New Brunswick in 2015.



Source: Statistics Canada, CANSIM table 282-0002.

⁸¹ Scotia Economics, Global Forecast Update, March 2, 2016, CIBC Economics, Provincial Forecast Update, March 4, 2016.

⁸² Statistics Canada, CANSIM table 282-0048.

Labour Force Survey Statistics - Canada

Canada	2014	2015	Annual Change	Percent Change
Population	28,980,600	29,279,800	299,200	1.0%
Labour Force	19,124,500	19,278,000	153,500	0.8%
Employed	17,802,200	17,946,600	144,400	0.8%
Unemployed	1,322,300	1,331,400	9,100	0.7%
Participation Rate	66.0%	65.8%	-0.2%	-
Employment Rate	61.4%	61.3%	-0.1%	-
Unemployment Rate	6.9%	6.9%	0.0%	-

Source: Statistics Canada CANSIM Table 282-0002 – Labour force survey estimates (LFS)

Employment growth forecasts from Canada's major banks are in the range of 0.4 per cent (TD, CIBC) to 0.7 per cent (RBC) for 2016 and 0.7 per cent (TD) to 0.9 per cent (RBC, Scotia, CIBC) for 2017.

The Conference Board of Canada is forecasting employment in Canada to increase by 0.9 per cent in 2016 and by 1.3 per cent in 2017. Growing investment in the business and public sectors is projected to accelerate employment growth in 2017.

“Last year, the Canadian workforce grew by 0.8 per cent—a relatively healthy growth rate given the oil price shock and the technical recession in early 2015. Yet, the private sector contributed only modestly to this growth. If health care and social assistance and educational services are excluded from the totals, the growth rate becomes a more modest 0.2 per cent. The Canadian labour market is now in another year of soft employment growth, with total employment set to expand by 0.9 per cent in 2016. The sharp reduction in energy investment due to the plunge in oil prices will continue to be the main factor limiting job prospects this year. Furthermore, despite stronger U.S. economic growth, the employment outlook for the Canadian manufacturing sector remains weak, since many manufacturing companies are likely to rely more heavily on capital investment, rather than on hiring, to increase production.”⁸³

Full-time employment in Canada rose by 189,400 or 1.3 per cent in 2015, while part-time employment declined by 45,000 or -1.3 per cent. Employment increased for both men and women in 2015, with employment among men up by 94,700 or 1.0 per cent and employment among women up by 49,700 or 0.6 per cent.

The majority of the job growth in 2015 was among older Canadians. Employment rose by 3.2 per cent for those aged 55 years and older, while employment for adults aged 25 - 54 years increased by just 0.4 per cent. Employment for youth aged 15 - 24 declined by almost 14,000 or -0.6 per cent in 2015.

⁸³ The Conference Board of Canada, Canadian Outlook, Economic Forecast, Winter 2016, p.39.

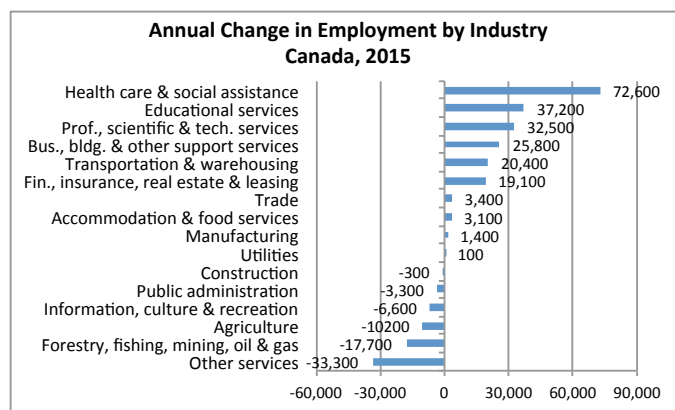
Employment by Type of Work, Gender and Age - Canada

Canada	2014	2015	Annual Change	Percent Change
Employment	17,802,200	17,946,600	144,400	0.8%
Full-time	14,369,900	14,559,300	189,400	1.3%
Part-time	3,432,300	3,387,300	-45,000	-1.3%
Men	9,328,000	9,422,700	94,700	1.0%
Women	8,474,200	8,523,900	49,700	0.6%
15–24 years	2,485,500	2,471,600	-13,900	-0.6%
25–54 years	11,826,100	11,872,500	46,400	0.4%
55 years +	3,490,600	3,602,500	111,900	3.2%

Source: Statistics Canada CANSIM Tables 282–0038 – Labour force survey estimates

Canada's services-producing sector added 171,100 net jobs in 2015, led by gains in health care and social assistance (+72,600), educational services (+37,200) and professional, scientific and technical services (+32,500). Only three industries in the services-producing sector recorded net job losses in 2015: other services (-33,300), information, culture and recreation (-6,600) and public administration (-3,300).

“The non-commercial services sector—which includes educational services and health care and social assistance services—has been an important contributor to overall employment growth over history, and has accounted for a growing share of total employment since the early 2000s. Over the forecast period, the non-commercial services sector will continue to be a steady driver of employment growth. Indeed, despite the provincial governments' tight control on spending, the aging of the population, in particular, will translate into stronger demand for health care services.”⁸⁴



Source: Statistics Canada, CANSIM table 282-0038.

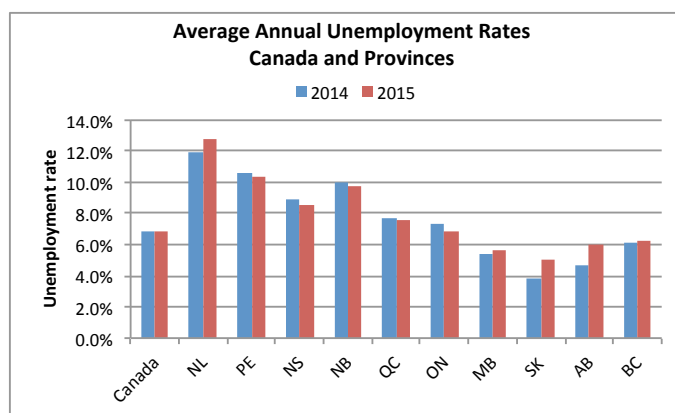
Employment in Canada's goods-producing sector declined by 26,700 or 0.7 per cent in 2015, led by a loss of 17,700 jobs in the resources industry (forestry, fishing, mining and oil and gas). Employment was also down by 10,200 in agriculture. Employment in utilities, construction and manufacturing was little changed in 2015.

⁸⁴ The Conference Board of Canada, Canadian Outlook, Economic Forecast, Winter 2016, p.44.

“...crude oil prices are forecast to average only US\$37 a barrel in 2016 and increase gradually over the forecast period, reaching around US\$51 a barrel in 2018 and US\$59 a barrel in 2019. The weakness in oil prices will continue to restrain over-all employment growth in the natural resource sector. Overall, the resource sector is expected to lose close to 6,000 jobs this year [2016] and see only modest job gains over the remainder of the forecast period.”⁸⁵

Unemployment

Canada’s unemployment rate remained unchanged at an average of 6.9 per cent in 2015. However, Saskatchewan and Alberta recorded the largest increases in their unemployment rates year-over-year. Saskatchewan’s unemployment rate jumped to 5.0 per cent in 2015, from 3.8 per cent the previous year. Alberta’s unemployment rate rose to 6.0 per cent in 2015, from 4.7 per cent in 2014. Four provinces - Prince Edward Island, New Brunswick, Quebec and Ontario posted lower unemployment rates in 2015 compared to the previous year.



Source: Statistics Canada, CANSIM table 282-0002.

Overall, Saskatchewan and Manitoba had the lowest unemployment rates among provinces in 2015. Newfoundland and Labrador recorded the highest unemployment rate in Canada, increasing to 12.8 per cent in 2015 from 11.9 per cent the previous year.

The Conference Board of Canada projects Canada’s unemployment rate to rise to 7.0 per cent in 2016, before declining to 6.6 per cent in 2017.

“As employment gains accelerate in 2017 and labour force growth slows over the next couple of years, the unemployment rate will fall from an estimated 7 per cent this year to 6.6 per cent in 2017. After 2017, employment gains are expected to decelerate. However, slow labour force growth resulting from the retirement of the baby boomers will lead to the gradual tightening of the Canadian labour market over the rest of the forecast period.”⁸⁶

⁸⁵ The Conference Board of Canada, Canadian Outlook, Economic Forecast, Winter 2016, p.40.

⁸⁶ Ibid, p.45.

The purpose of the quarterly survey is to gather information from Calgary and area employers on their recruitment and retention practices and various other employment issues they are facing. Over the course of the year, employers were divided into four categories based on the number of employees in the company and results of the survey were reported on as follows:

- ✓ Q1 2015: Large-sized companies with 100+ employees
- ✓ Q2 2015: Medium-sized companies with 50 – 99 employees
- ✓ Q3 2015: Small-sized companies with 10 – 49 employees
- ✓ Q4 2015: Micro-sized companies with <10 employees

Survey Profile

The 802 employers surveyed employ approximately 161,013 people. Of this total, 64 per cent are full-time employees, 22 per cent are part-time employees, and 14 per cent are either contract, seasonal, casual, temporary or relief staff.

How many people does your company employ in the Calgary region?

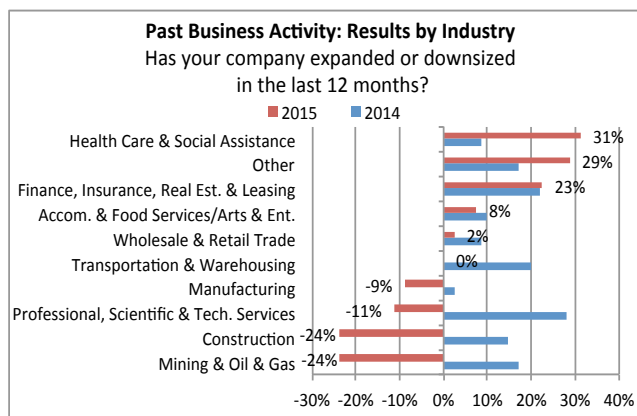
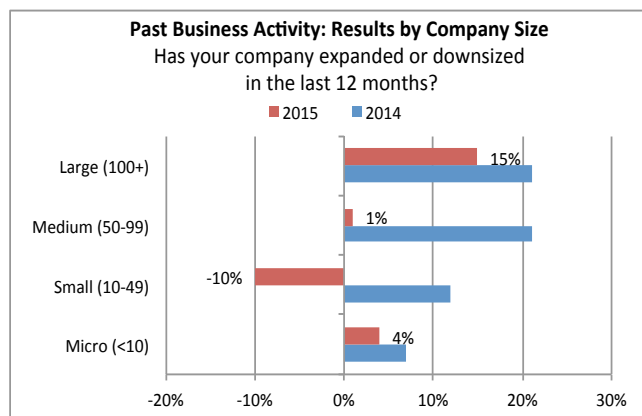
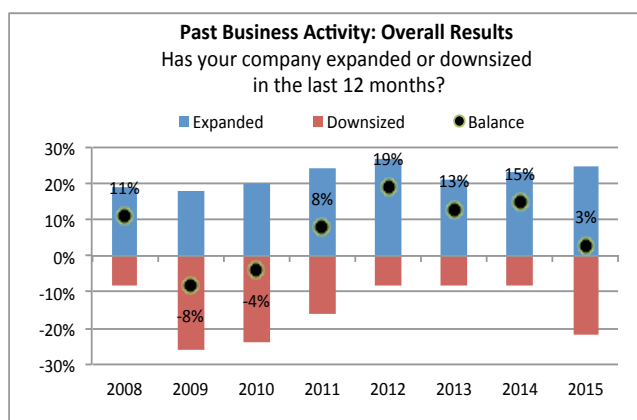
Industry	Total Employees	Number of Companies
Mining & Oil & Gas	16,522	80
Construction	11,191	80
Manufacturing	6,929	80
Wholesale & Retail Trade	17,301	82
Transportation & Warehousing	11,820	80
Professional, Scientific & Technical Services	7,062	80
Health Care & Social Assistance	48,198	80
Accommodation & Food Services/Arts & Entertainment	7,566	80
Finance, Insurance, Real Estate & Leasing	7,875	80
Other	26,549	80
Total	161,013	802

"Other" represents companies in any of the following industries: agriculture, utilities, information & culture, management of companies, administrative & support services, educational services, other services or public administration.

Business Activity

On balance, 3 per cent of the employers said their company expanded in the year prior to their survey. Results were most positive among large-sized employers and employers in the health care and social assistance industry

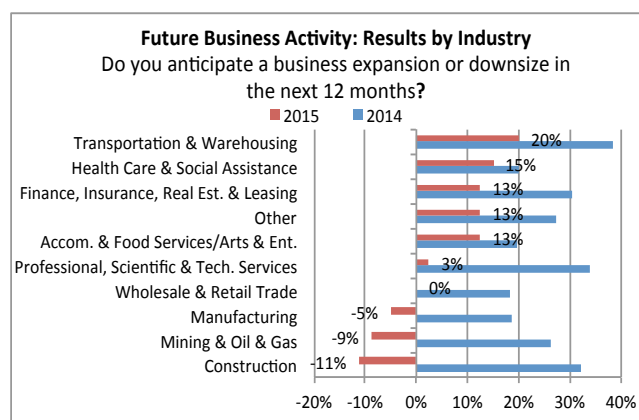
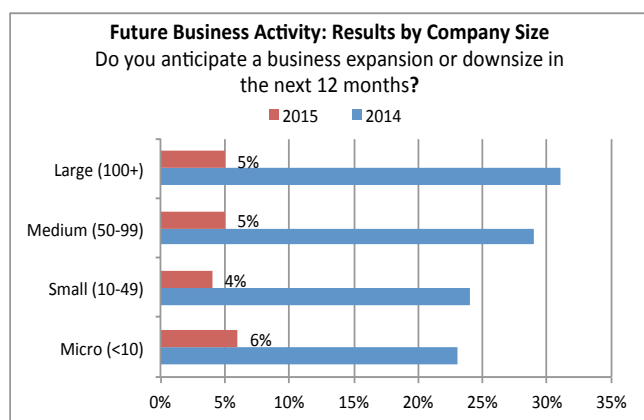
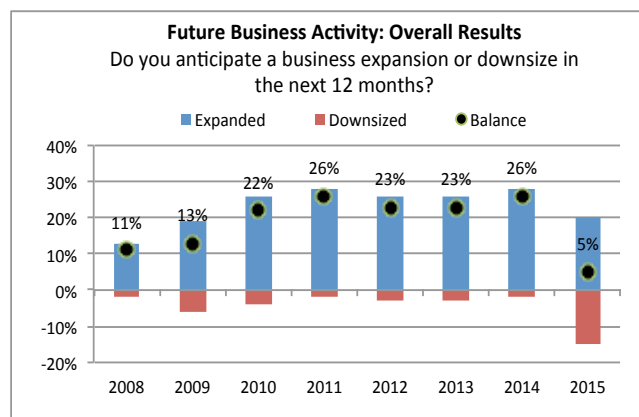
Twenty-five per cent of the employers surveyed in 2015 said their company expanded in the 12 months prior to their survey and 22 per cent reported their company downsized, resulting in a positive balance of 3 per cent.⁸⁷ This is down significantly from the 2014 results, when 15 per cent of the employers on balance reported their company expanded. Results varied by company size and industry, but were most positive among large-sized employers (15 per cent) and employers in the health care and social assistance industry (31 per cent), other industry (29 per cent) and finance, insurance, real estate and leasing industry (23 per cent). On balance, approximately one-quarter of the mining and oil and gas and construction employers and about 10 per cent of the professional, scientific and technical services and manufacturing employers said they downsized in the prior year.



⁸⁷ Percentage of companies reporting an expansion minus percentage of companies reporting a downsize.

On balance, 5 per cent of the employers anticipate a business expansion in the next 12 months. Results were similar by company size, but were most positive in the transportation and warehousing industry.

Twenty per cent of the employers surveyed in 2015 anticipated a business expansion in the 12 months following their survey and 15 per cent anticipated a business downsize, for a positive balance of 5 per cent.⁸⁸ These results are down significantly from the 2014 results, when 26 per cent of the employers on balance anticipated a business expansion in the year following their survey. Results were similar by company size, but were more positive among employers in the transportation and warehousing industry (20 per cent) and health care and social assistance industry (15 per cent). On balance, approximately 10 per cent of the construction and mining and oil and gas employers and 5 per cent of the manufacturing employers anticipated a business downsize in the year following their survey.



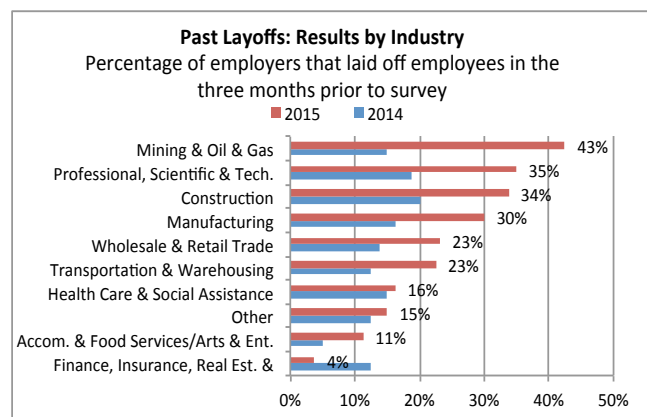
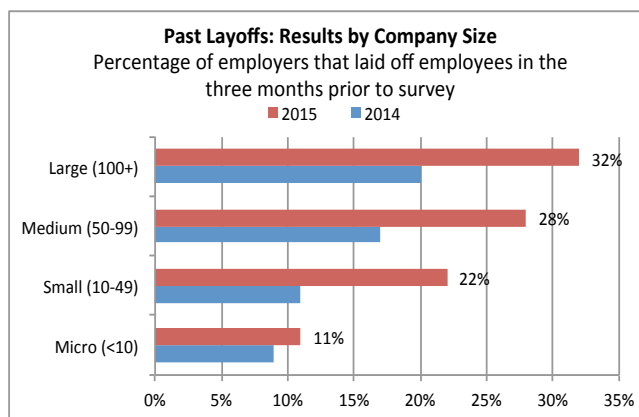
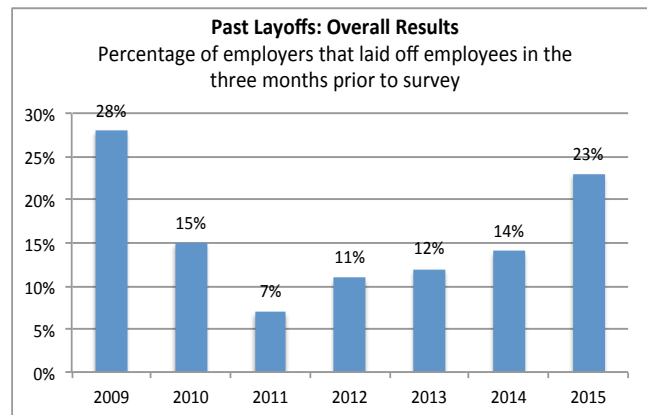
⁸⁸ Percentage of companies anticipating a business expansion minus percentage of companies anticipating a business downsize.

Layoffs

Twenty-three per cent of the employers laid off workers in the three months prior to their survey. More large-sized employers reported they laid off employees, as did employers in the mining and oil and gas industry.

Twenty-three per cent of the employers surveyed in 2015 reported they laid off employees in the three months prior to their survey (for reasons other than seasonality). This was up substantially from 14 per cent of the employers in 2014, and was led by large-sized employers (32 per cent) and employers from the mining and oil and gas (43 per cent), professional, scientific and technical services (35 per cent), construction (34 per cent) and manufacturing (30 per cent) industries.

Overall, employers surveyed in 2015 reported about 3,660 people were laid off, representing a layoff rate of 2.3 per cent. The mining and oil and gas industry had the highest layoff rate at 11.7 per cent, followed by construction (9.3 per cent), manufacturing (2.8 per cent) and professional, scientific and technical services (2.3 per cent). The remaining industries had a layoff rate of less than 1.0 per cent. Additional details on layoffs can be found in Appendix B.



EMPLOYER SURVEY

Number of Layoffs and Layoff Rates (in the three months prior to survey)

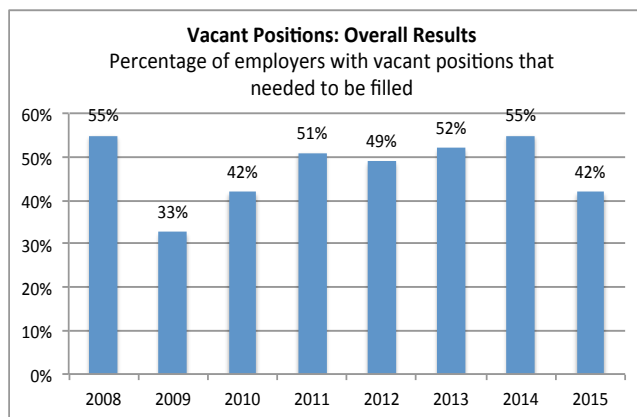
Industry	Total Layoffs	Layoff Rate
Mining & Oil & Gas	1,937	11.7%
Construction	1,040	9.3%
Manufacturing	194	2.8%
Professional, Scientific & Technical Services	163	2.3%
Transportation & Warehousing	98	0.8%
Wholesale & Retail Trade	90	0.5%
Accommodation & Food Services/Arts & Entertainment	29	0.4%
Finance, Insurance, Real Estate & Leasing	22	0.3%
Health Care & Social Assistance	64	0.1%
Other	24	0.1%
Total	3,661	2.3%

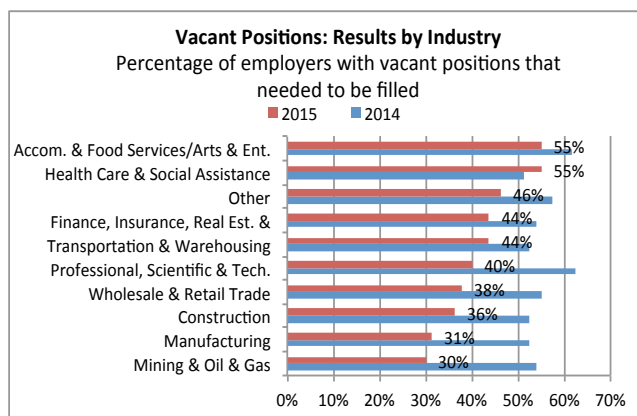
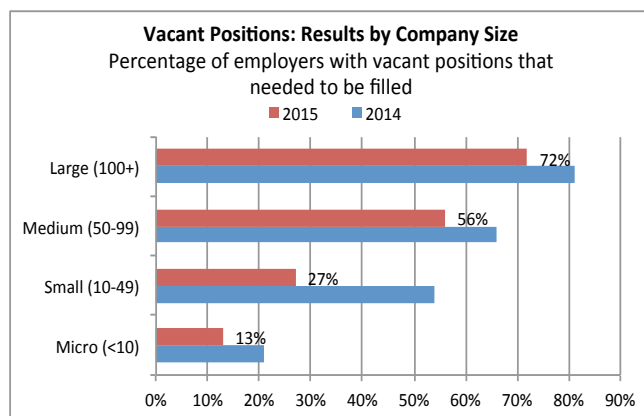
Layoff rate is the number of layoffs as a percent of total employees.

Vacant Positions

Forty-two per cent of the employers had vacant positions that needed to be filled at the time of their survey. More large-sized employers and more employers in the accommodation and food services/arts and entertainment and health care and social assistance industries reported they had vacant positions that needed to be filled.

Forty-two per cent of the employers surveyed in 2015 had vacant positions that needed to be filled at the time of their survey, down from a high of 55 per cent in 2014 and matching the level of 2010. In 2015, the employers reporting vacancies had approximately 2,844 positions that needed to be filled, down from 2,990 vacancies reported by employers in 2014. Seventy-two per cent of the large-sized employers had vacant positions that needed to be filled, compared to 13 per cent of the micro-sized employers. Results also varied by industry with 55 per cent of the accommodation and food services/arts and entertainment and health care and social assistance employers reporting they had vacant positions, compared to about 30 per cent of the manufacturing and mining and oil and gas employers.





Vacancy rates ranged from a high of 5.5 per cent in the accommodation and food services/arts and entertainment industry to a low of 0.5 per cent in the mining and oil and gas industry.

Number of Vacant Positions and Vacancy Rates

Industry	# of Vacant Positions	Vacancy Rate
Accommodation & Food Services/Arts & Entertainment	437	5.5%
Other	707	2.6%
Construction	221	1.9%
Transportation & Warehousing	218	1.8%
Finance, Insurance, Real Estate & Leasing	140	1.7%
Wholesale & Retail Trade	275	1.6%
Professional, Scientific & Technical Services	108	1.5%
Health Care & Social Assistance	577	1.2%
Manufacturing	73	1.0%
Mining & Oil & Gas	88	0.5%
Total	2,844	1.7%

Vacancy rate is the number of vacant positions divided by all positions (vacant plus occupied)

The top five vacant positions in 2015 were program leaders and instructors in recreation, sport and fitness (486 positions), nurse aides, orderlies and patient service associates (131 positions), registered nurses (114 positions), food counter attendants, kitchen helpers and related occupations (90 positions) and food and beverage servers (89 positions).

Top Vacant Positions in 2015

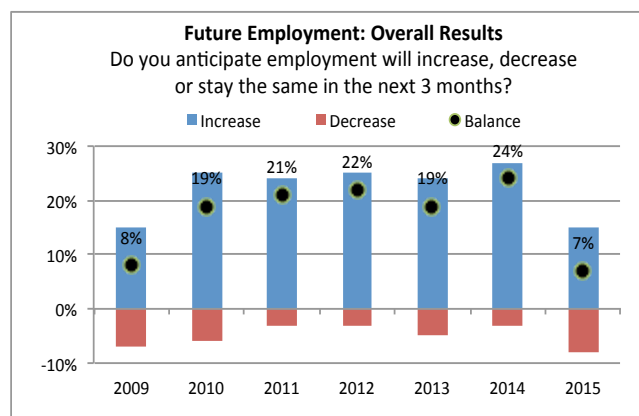
NOC Code	Occupation	Vacant Positions
5254	Program leaders and instructors in recreation, sport and fitness	486
3413	Nurse aides, orderlies and patient service associates	131
3012	Registered nurses	114
6711	Food counter attendants, kitchen helpers and related occupations	90
6513	Food and beverage servers	89
6731	Light duty cleaners	86
8255	Landscaping and grounds maintenance contractors and managers	81
6322	Cooks	80
7511	Truck drivers	79
4212	Community and social service workers	61
6622	Grocery clerks and store shelf stockers	56
4413	Elementary and secondary school teacher assistants	52
2145	Petroleum engineers	51
1521	Shippers and receivers	49
9617	Labourers in food, beverage and tobacco processing	42
1411	General office support workers	40
4032	Elementary school and kindergarten teachers	36
711	Construction managers	33
1111	Financial auditors and accountants	31
6311	Food service supervisors	30
6221	Technical sales specialists - wholesale trade	29
631	Restaurant and food service managers	28
4011	University professors	27
8612	Landscaping and grounds maintenance labourers	26
7512	Bus drivers, subway operators and other transit operators	25

Only occupations with 25 or more vacancies are shown

Future Employment

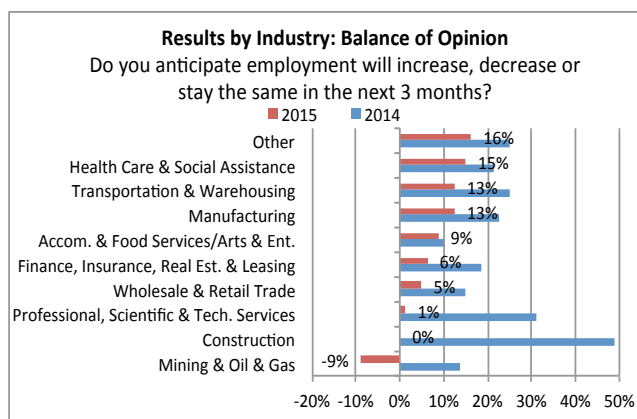
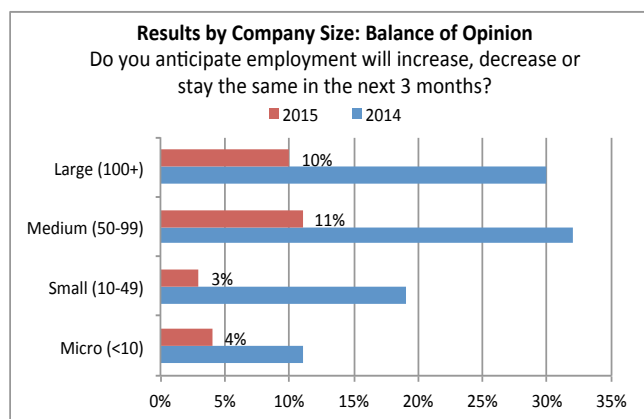
On balance, 7 per cent of the employers anticipated employment in their company would increase in the three months following their survey. Results were most positive among large and medium-sized employers and employers in the other and health care and social assistance industries.

Once any vacant positions were filled, 15 per cent of the employers surveyed in 2015 anticipated employment would increase in the three months following their survey while 8 per cent anticipated employment would decrease, for a positive balance of 7 per cent.⁸⁹ This is down significantly from the 2014 results when almost one-quarter of the employers on balance anticipated employment would increase. Results varied by company size and industry, but were most positive among medium (11 per cent) and large-sized employers (10 per cent) and employers in the other (16 per



⁸⁹ Percentage of employers that anticipated employment in their company would increase in the next three months minus the percentage of employers that anticipated employment would decrease.

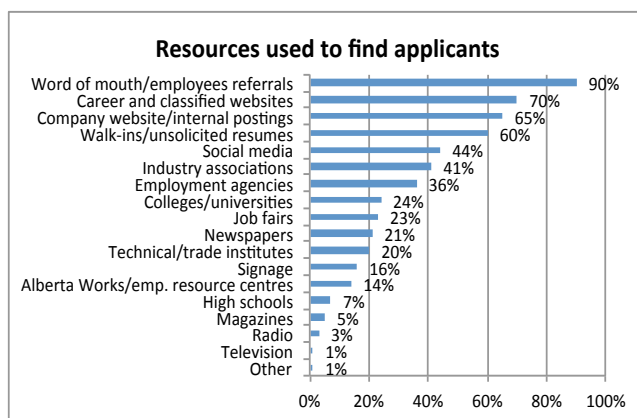
cent) and health care and social assistance industry (15 per cent). Nine per cent of the mining and oil and gas employers anticipated employment would decrease.



Recruitment Resources

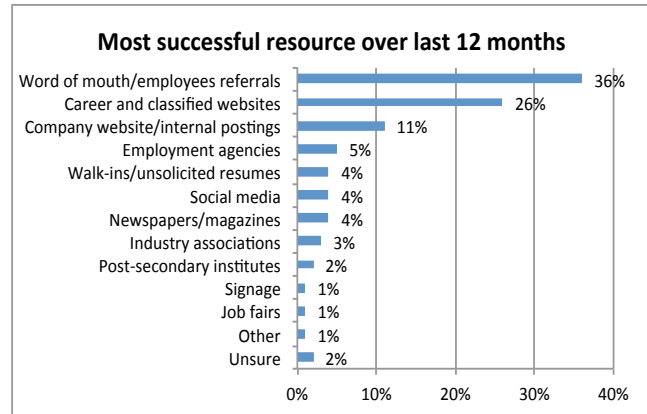
Ninety per cent of the employers surveyed in 2015 use word of mouth/employee referrals to find applicants.

Employers were asked to identify all the resources they use to find applicants. The top resources employers use are word of mouth/employee referrals (90 per cent), career and classified websites (70 per cent), company website/internal postings (65 per cent) and walk-ins/unsolicited resumes (60 per cent). Forty-four per cent of the employers said they use social media as a resource, up from 33 per cent in 2014.



Word of mouth/employee referrals and career and classified websites were the most successful resources for employers surveyed in 2015.

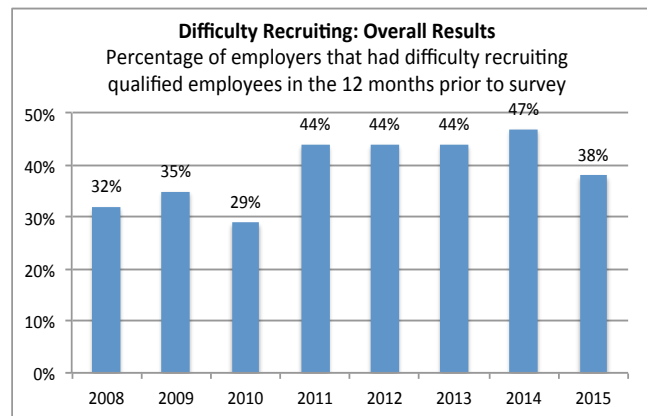
Employers were then asked to specify the resource that was the *most successful* in the year prior to their survey. Of all the resources mentioned, word of mouth/employee referrals and career and classified websites were the most successful, reported by 36 per cent and 26 per cent of the employers respectively. While approximately two-thirds of the employers reported they use company website/internals postings as a resource to find applicants, only 11 per cent said it was the most successful over the last year.

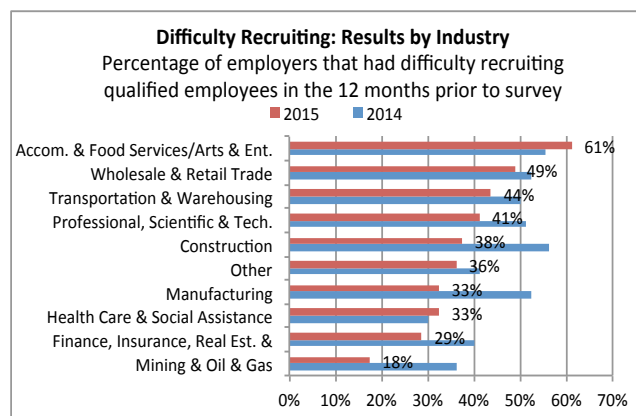
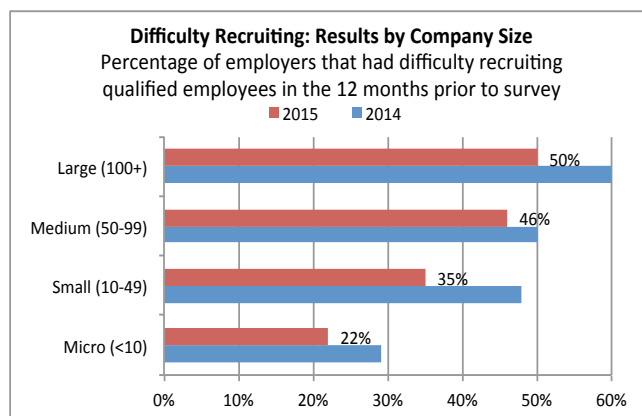


Recruiting Difficulties

Thirty-eight per cent the employers reported having difficulty recruiting qualified employees. More large-sized employers and more employers in the accommodation and food services/arts and entertainment industries had difficulty recruiting qualified employees.

Overall, 38 per cent of the employers surveyed in 2015 said they had difficulty recruiting qualified employees in the 12 months prior to their survey, down from a high of 47 per cent the previous year. Results varied by company size and industry, with more large (50 per cent) and medium-sized employers (46 per cent) and more employers in the accommodation and food services/arts and entertainment (61 per cent) and wholesale and retail trade industries (49 per cent) having difficulty recruiting qualified employees.





The 305 employers (38 per cent) that reported having difficulty recruiting were also asked to specify the occupations that were the most difficult to fill. Truck drivers was the top occupation, reported by 8 per cent of the employers, followed by food counter attendants, kitchen helpers and related occupations and cooks (4 per cent each).

What occupations have been the most difficult to fill?

NOC Code	Occupation	Employers %
7511	Truck drivers	8%
6711	Food counter attendants, kitchen helpers and related occupations	4%
6322	Cooks	4%
711	Construction managers	3%
6411	Sales representatives - wholesale trade (non-technical)	3%
6731	Light duty cleaners	3%
7611	Construction trades helpers and labourers	3%
621	Retail and wholesale trade managers	2%
2171	Information systems analysts and consultants	2%
6733	Janitors, caretakers and building superintendents	2%
1111	Financial auditors and accountants	2%
2145	Petroleum engineers	2%
4212	Community and social service workers	2%
6221	Technical sales specialists - wholesale trade	2%
6513	Food and beverage servers	2%
7312	Heavy-duty equipment mechanics	2%
4214	Early childhood educators and assistants	2%
6525	Hotel front desk clerks	2%
7237	Welders and related machine operators	2%
7452	Material handlers	2%

Note: 305 employers reported having difficulty recruiting qualified employees.

Only occupations with a response of 2 per cent or more are shown in the table.

Employers responded to the difficulty finding qualified employees in a variety of ways. Of the 305 employers that reported having difficulty recruiting qualified employees, 77 per cent increased recruiting efforts, 60 per cent did not fill the job opening and 53 per cent increased the workload for current workers. Eighteen per cent of the 305 employers applied for or hired temporary foreign workers.

How has your company responded to the difficulty recruiting qualified employees?

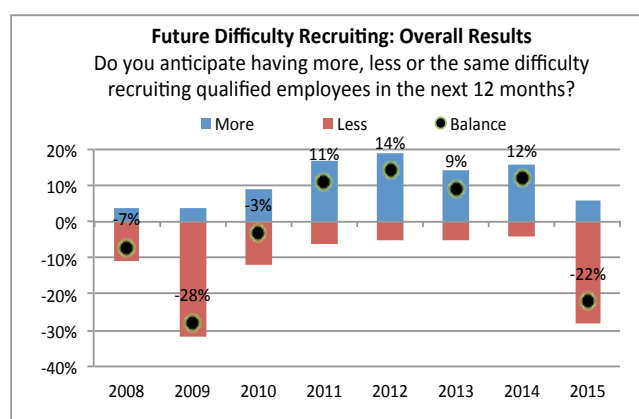
Response to hiring difficulties	Employers %
Increased recruiting efforts	77%
Did not fill the job opening	60%
Increased workload for current workers	53%
Increased investment in training provided by in-house staff	40%
Hired a less qualified applicant	30%
Hired contingent workers, including temps, contractors and freelancers	29%
Targeted underutilized or new talent pools*	23%
Redeployed employees to new roles where their skills were more needed	21%
Increased wages/benefits to attract more applicants	20%
Applied for/hired temporary foreign workers	18%
Partnered with educational institutions to ensure programs develop candidates with the right skills	16%
Increased investment in training provided by a third-party	12%
Outsourced the work	11%
Redesigned the job to change the required skills	9%
Applied for a Canada-Alberta Job Grant	8%
Implemented an employee referral program	2%
Other	2%
Started actively hiring out of province/country	2%
Increased networking opportunities	2%
Downsized the company	1%
Nothing	3%

Note: 305 employers reported having difficulty recruiting qualified employees.

* Mature workers, stay at home parents, persons with disabilities, Aboriginal peoples, etc.

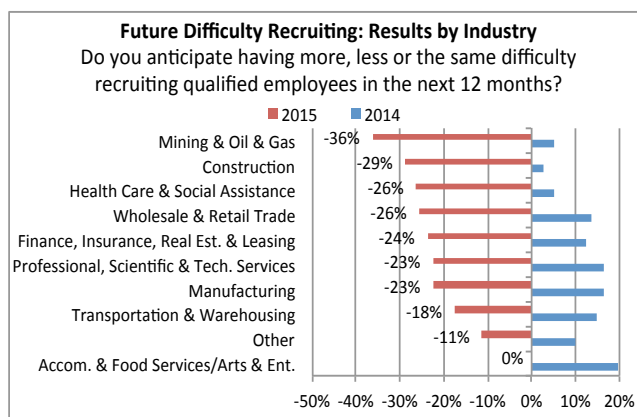
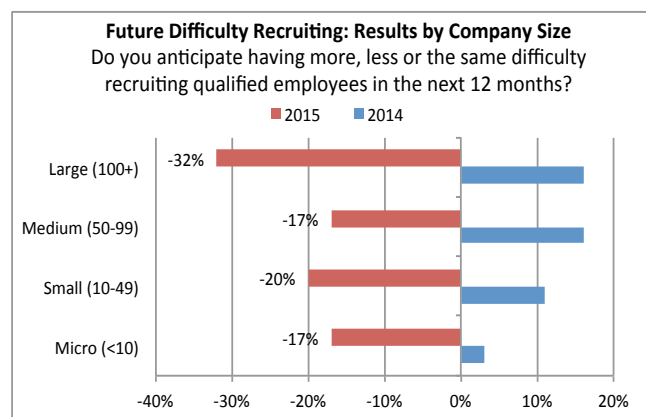
On balance, 22 per cent of the employers anticipated having less difficulty recruiting qualified employees in the 12 months following their survey. More large-sized employers and more employers in the mining and oil and gas industry anticipated having less difficulty recruiting.

Six per cent of the employers surveyed in 2015 anticipated having more difficulty recruiting qualified employees in the 12 months following their survey and 28 per cent anticipated having less difficulty, for a balance of -22 per cent.⁹⁰ In 2014, 12 per cent of the employers on balance



⁹⁰ Percentage of employers that anticipate having more difficulty recruiting qualified employees in the 12 months following their survey minus the percentage of employers that anticipate having less difficulty.

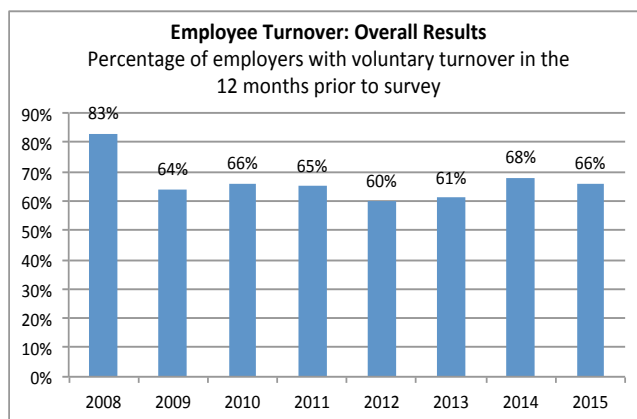
anticipated they would have more difficulty recruiting qualified employees. Thirty-two per cent of the large-sized employers anticipated they would have less difficulty recruiting, compared to 17 per cent of the medium and micro-sized employers. In addition, 36 per cent of the mining and oil and gas employers anticipated having less difficulty, a significant change from the 2014 results when 5 per cent of the employers on balance anticipated having more difficulty.



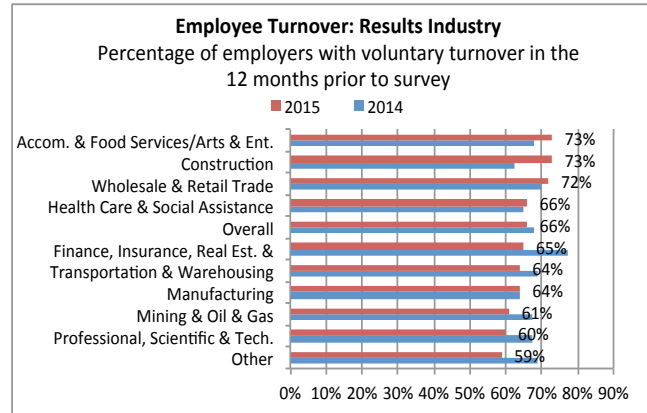
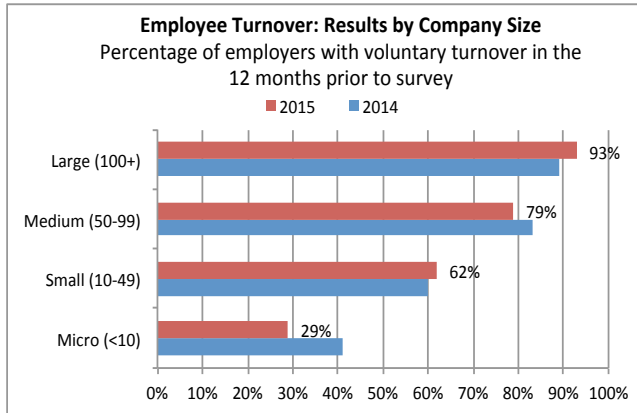
Employee Turnover

Two-thirds of the employers reported employees had voluntarily left their company in the prior year. More large-sized employers, as well as more employers in the accommodation and food services/arts and entertainment and construction industries reported employees had voluntarily left their companies.

Overall, 66 per cent of the employers surveyed in 2015 reported employees had left their company in the 12 months prior to their survey as a result of voluntary turnover,⁹¹ down only slightly from 68 per cent in 2014. Results varied by company size and industry with more large (93 per cent) and medium-sized employers (79 per cent) reporting voluntary turnover. In addition, 73 per cent of the accommodation and food services/arts and entertainment and construction employers and 72 per cent of the wholesale and retail trade employers had voluntary employee turnover.

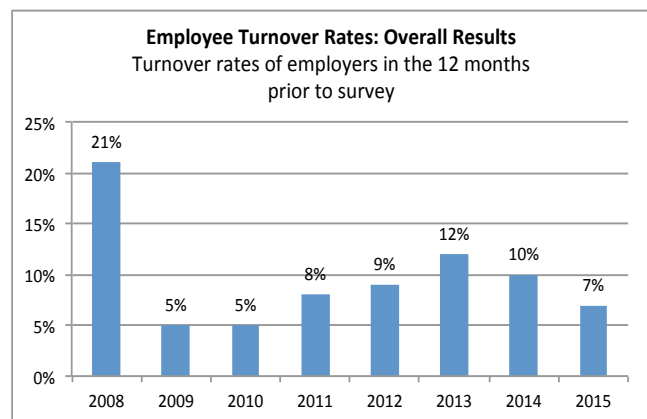


⁹¹ Initiated by the employee, not including retirement or maternity leave.



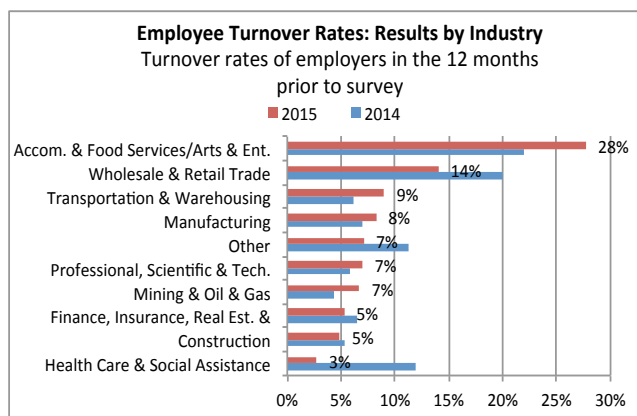
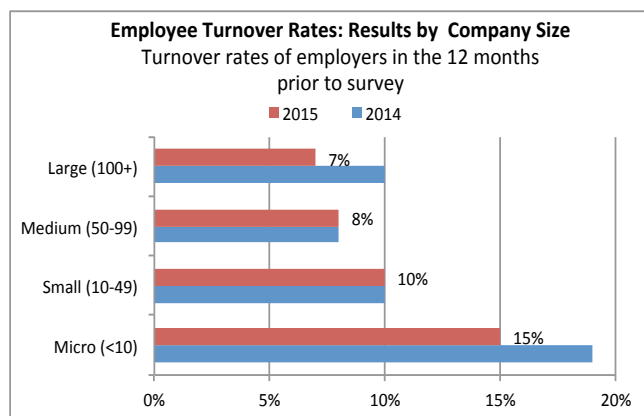
Overall, the turnover rate was 7 per cent for employers surveyed in 2015. Micro-sized employers and employers in the accommodation and food services/arts and entertainment industry had the highest turnover rates on average.

Employers reported approximately 11,910 employees left their companies in the 12 months prior to their survey as a result of voluntary turnover. This equates to a turnover rate⁹² of 7 per cent, down from 10 per cent in 2014. At 15 per cent, the micro-sized employers had the highest turnover rate on average in 2015. Among industries, the accommodation and food services/arts and entertainment and wholesale and retail trade industries had the highest turnover rates, at 28 per cent and 14 per cent respectively. The health care and social assistance industry had the lowest turnover rate on average in 2015 at 3 per cent, down from 12 per cent in 2014.



⁹² Total turnover divided by total employees.

EMPLOYER SURVEY



Employers were also asked to specify the occupations that experienced the most voluntary turnover. Truck drivers and community and social service workers (5 per cent each) and construction trades helpers and labourers and food and beverage servers (4 per cent) were the top occupations mentioned by employers.

What occupations have experienced the most voluntary turnover?

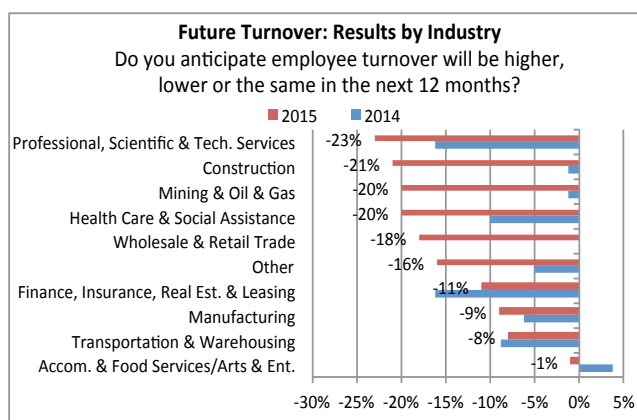
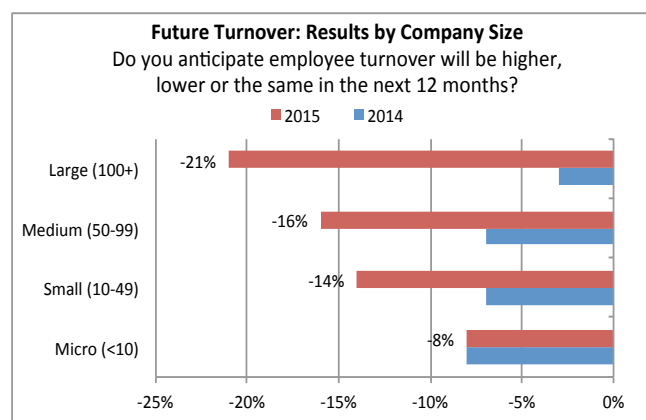
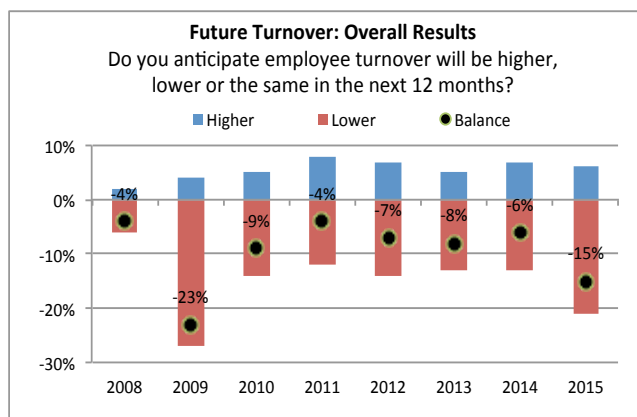
NOC Code	Occupation	Employers %
7511	Truck drivers	5%
4212	Community and social service workers	5%
7611	Construction trades helpers and labourers	4%
6513	Food and beverage servers	4%
6421	Retail salespersons	3%
6731	Light duty cleaners	3%
1111	Financial auditors and accountants	2%
6711	Food counter attendants, kitchen helpers and related occupations	2%
6322	Cooks	2%
1521	Shippers and receivers	2%
8612	Landscaping and grounds maintenance labourers	2%
6221	Technical sales specialists - wholesale trade	2%
6411	Sales representatives - wholesale trade (non-technical)	2%
1411	General office support workers	2%
3413	Nurse aides, orderlies and patient service associates	2%

Note: 526 employers reported employees had left their company in the previous 12 months as a result of voluntary turnover.

Only occupations with a response of 2 per cent or more are shown in the table.

Fifteen per cent of the employers on balance anticipated voluntary turnover would be lower in the 12 months following their survey. More large-sized employers and more employers from the professional, scientific and technical services industry anticipated voluntary turnover would be lower.

Six per cent of the employers surveyed in 2015 anticipated voluntary turnover would be higher in the 12 months following their survey and 21 per cent anticipated it would be lower, for a balance of -15 per cent.⁹³ In 2014, 6 per cent of the employers on balance anticipated turnover would be lower in the year following their survey. Twenty-one per cent of the large-sized employers on balance anticipated turnover would be lower in the next year, compared to 8 per cent of the micro-sized employers. Twenty-three per cent of the professional, scientific and technical services employers anticipated employee turnover would be lower, compared to 1 per cent of the accommodation and food services/arts and entertainment employers.

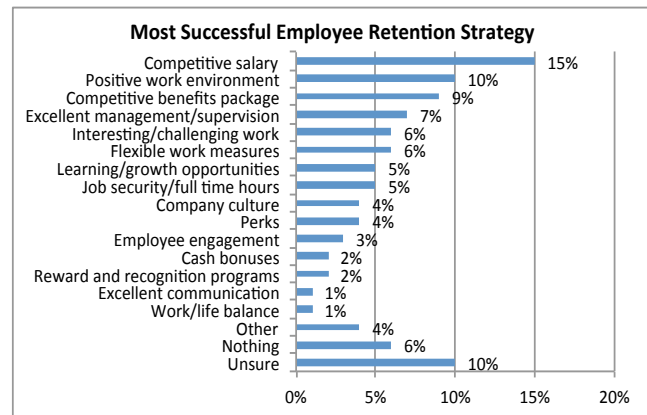


⁹³ Percentage of employers that anticipated voluntary turnover would be higher in the 12 months following their survey minus the percentage of employers that anticipated voluntary turnover would be lower.

Employee Retention

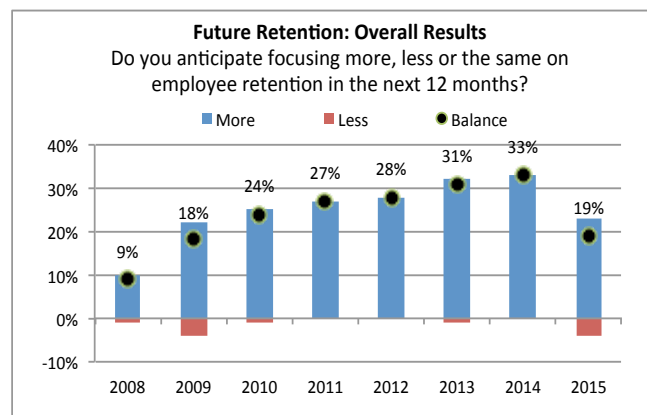
The top successful retention strategy was providing a competitive salary.

Employers were asked to indicate an employee retention strategy that was the most successful in the 12 months prior to their survey. The top successful strategies were providing a competitive salary (15 per cent), positive work environment (10 per cent), competitive benefits package (9 per cent) and excellent management/supervision (7 per cent). Six per cent of the employers said nothing was successful in retaining employees and 10 per cent were unsure.



Nineteen per cent of the employers on balance anticipated they would be focusing more on employee retention in the following year. More large-sized employers and more employers in the health care and social assistance industry anticipated they would be focusing more on employee retention.

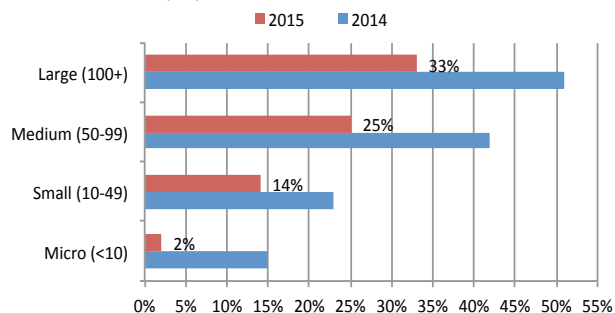
Twenty-three per cent of the employers surveyed in 2015 anticipated they would be focusing more on employee retention in the year following their survey, 4 per cent anticipated they would be focusing less and 73 per cent anticipated they would be focusing about the same, for a positive balance of 19 per cent.⁹⁴ This is down from the 2014 results when 33 per cent of the employers said they would be focusing more on employee retention. One-third of the large-sized employers anticipated they would be focusing more, compared to only 2 per cent of the micro-sized employers. Among industries, 34 per cent of the health care and social assistance employers anticipated they would be focusing more, compared to only 3 per cent of the mining and oil and gas employers.



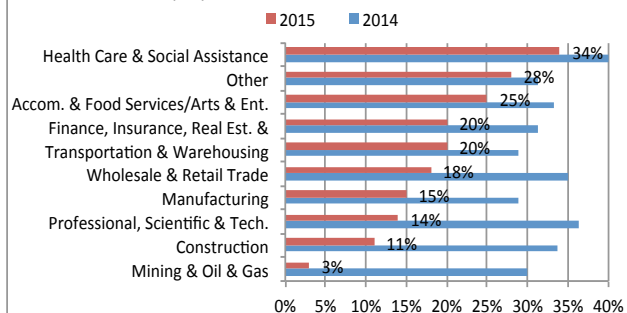
⁹⁴ Percentage of employers that anticipate they will be focusing more on employee retention in the 12 months following their survey minus the percentage of employers that anticipate they will be focusing less.

Future Retention: Balance of Opinion

Do you anticipate focusing more, less or the same on employee retention in the next 12 months?

**Future Retention: Balance of Opinion**

Do you anticipate focusing more, less or the same on employee retention in the next 12 months?



JOB BANK ANALYSIS

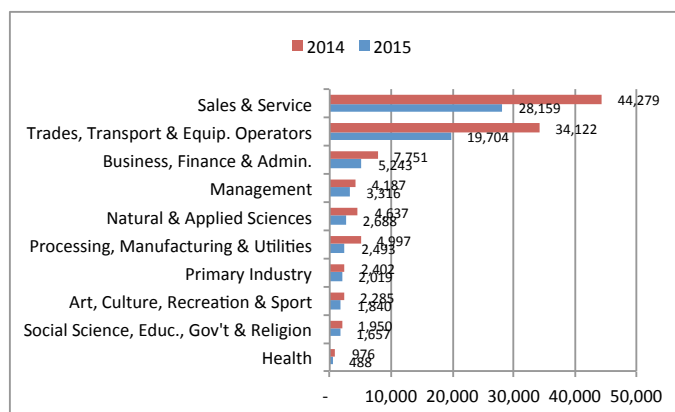
This section provides a summary of jobs posted to the Job Bank in 2015.

Service Canada's Job Bank is the country's largest bi-lingual online listing of job opportunities in Canada. Job seekers are able to view thousands of new job opportunities across Canada every day and access online tools such as Job Match, Job Alert, Resume Builder and Career Navigator free of charge. The site also has a training and careers section, which helps job seekers identify career options, as well as provides information on trends, employment prospects and salary ranges of occupations. Employers have access to a variety of HR management information resources and can advertise and manage their job postings online at their own convenience free of charge.

City of Calgary

For the City of Calgary, there were 28,130 job postings⁹⁵ on the Job Bank in 2015, advertising for a total of 67,600 positions. This was down significantly from 107,590 positions in 2014. The most significant year-over-year declines in advertised job positions were in processing, manufacturing and utilities occupations and health occupations (-50 per cent each) and natural and applied sciences occupations and trades, transport and equipment operators occupations (-42 per cent each). The top five occupations advertised in 2015 were food counter attendants, kitchen helpers and related occupations (5,235 positions), cooks (4,415 positions), food service supervisors (3,530 positions), retail salespersons and sales clerks (2,641 positions) and truck drivers (2,589 positions).

**Number of Positions by Occupation
2014 and 2015, City of Calgary**

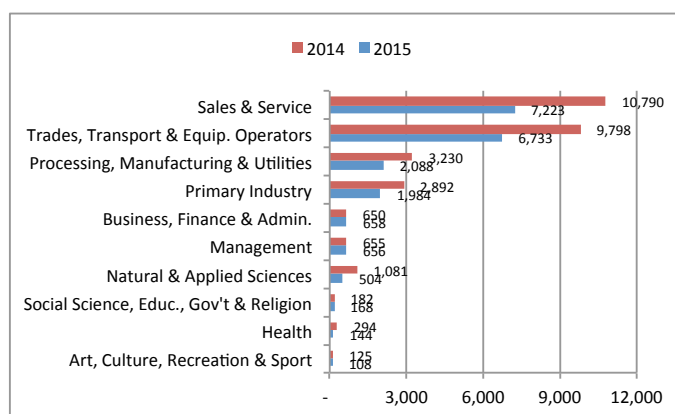


⁹⁵ Total job postings are all unduplicated postings appearing in the Job Bank each week. This figure includes postings from the previous weeks that have been reposted as well as new job postings.

Communities Surrounding Calgary

For the communities surrounding Calgary,⁹⁶ there were 6,930 job postings on the Job Bank in 2015, advertising for a total of 20,266 positions. This was down 32 per cent from 29,697 positions in 2014. Sales and service and trades, transport and equipment operator occupations accounted for about 70 per cent of the advertised positions in 2015. The top five advertised occupations were truck drivers (2,208 positions), industrial butchers and meat cutters, poultry preparers and related workers (1,402 positions), food counter attendants, kitchen helpers and related occupations (1,161 positions), cooks (1,074 positions) and food service supervisors (1,026 positions).

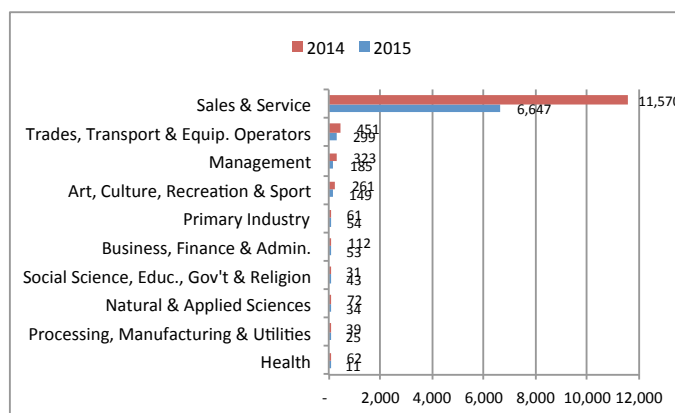
**Number of Positions by Occupation
2014 and 2015, Surrounding Communities**



Banff/Canmore Area

For the Banff/Canmore area, there were 2,445 job postings on the Job Bank in 2015, advertising for a total of 7,500 positions. This was down 42 per cent from 12,982 positions in 2014. Sales and service occupations accounted for almost 90 per cent of the advertised positions in 2015. The top five advertised occupations were food counter attendants, kitchen helpers and related occupations (2,166 positions), food service supervisors (1,442 positions), light duty cleaners (869 positions), cooks, (445 positions) and retail salespersons and sales clerks (302 positions).

**Number of Positions by Occupation
2014 and 2015, Banff/Canmore Area**



⁹⁶ Including but not limited to Airdrie, Chestermere, Cochrane, High River and Okotoks.

Calgary (city) Positions - 2015⁹⁷

NOC Code	Occupation	Positions
6641	Food Counter Attendants, Kitchen Helpers and Related Occupations	5,235
6242	Cooks	4,415
6212	Food Service Supervisors	3,530
6421	Retail Salespersons and Sales Clerks	2,641
7411	Truck Drivers	2,589
7271	Carpenters	1,962
1453	Customer Service, Information and Related Clerks	1,946
7452	Material Handlers	1,631
6661	Light Duty Cleaners	1,581
7611	Construction Trades Helpers and Labourers	1,548
8612	Landscaping and Grounds Maintenance Labourers	1,445
6474	Babysitters, Nannies and Parents' Helpers	1,199
7284	Plasterers, Drywall Installers and Finishers and Lathers	1,182
631	Restaurant and Food Service Managers	1,024
9619	Other Labourers in Processing, Manufacturing and Utilities	956
5254	Program leaders and instructors in recreation, sport and fitness	942
7322	Motor Vehicle Body Repairers	874
6671	Operators and Attendants in Amusement, Recreation and Sport	854
4212	Social and community service workers	851
6211	Retail Trade Supervisors	807
6411	Sales Representatives - Wholesale Trade (Non-Technical)	798
6622	Store shelf stockers, clerks and order fillers	752
621	Retail Trade Managers	719
7291	Roofers and Shinglers	718
6453	Food and Beverage Servers	678
7282	Concrete Finishers	672
6651	Security Guards and Related Occupations	655
7421	Heavy Equipment Operators (Except Crane)	654
7321	Automotive service technicians, truck and bus mechanics and mechanical repairers	567
6611	Cashiers	543
6215	Cleaning Supervisors	483
2171	Information Systems Analysts and Consultants	479
1471	Shippers and Receivers	474
7441	Residential and Commercial Installers and Servicers	472
7294	Painters and decorators (except interior decorators)	406
6623	Other sales related occupations	396
611	Sales, Marketing and Advertising Managers	387
6662	Specialized Cleaners	380
7283	Tilesetters	371
711	Construction Managers	362
7414	Delivery and Courier Service Drivers	357
7443	Automotive Mechanical Installers and Servicers	355
7251	Plumbers	344
7265	Welders and Related Machine Operators	344
7272	Cabinetmakers	343
7312	Heavy-Duty Equipment Mechanics	338
7244	Electrical Power Line and Cable Workers	337
7412	Bus Drivers and Subway and Other Transit Operators	334
2225	Landscape and horticulture technicians and specialists	332
6241	Chefs	326
1122	Professional occupations in business management consulting	306
8256	Supervisors, Landscape and Horticulture	304

⁹⁷ Only occupations with 300 or more positions are shown in the table.

Communities Surrounding Calgary Positions - 2015⁹⁸

NOC Code	Occupation	Positions
7411	Truck Drivers	2,208
9462	Industrial Butchers and Meat Cutters, Poultry Preparers and Related Workers	1,402
6641	Food Counter Attendants, Kitchen Helpers and Related Occupations	1,161
6242	Cooks	1,074
6212	Food Service Supervisors	1,026
6474	Babysitters, Nannies and Parents' Helpers	785
8612	Landscaping and Grounds Maintenance Labourers	663
6421	Retail Salespersons and Sales Clerks	593
7611	Construction Trades Helpers and Labourers	469
7271	Carpenters	466
9617	Labourers in food, beverage and associated products processing	416
8253	Farm Supervisors and Specialized Livestock Workers	379
7321	Automotive service technicians, truck and bus mechanics and mechanical repairers	363
7284	Plasterers, Drywall Installers and Finishers and Lathers	341
1453	Customer Service, Information and Related Clerks	312
8432	Nursery and Greenhouse Workers	308
8431	General Farm Workers	289
7291	Roofers and Shinglers	276
631	Restaurant and Food Service Managers	273
6251	Butchers and Meat Cutters - Retail and Wholesale	270
6651	Security Guards and Related Occupations	264
7282	Concrete Finishers	249
2225	Landscape and horticulture technicians and specialists	234
6453	Food and Beverage Servers	233
6661	Light Duty Cleaners	231
6211	Retail Trade Supervisors	227
7283	Tilesetters	227
7312	Heavy-Duty Equipment Mechanics	218
7421	Heavy Equipment Operators (Except Crane)	214
7443	Automotive Mechanical Installers and Servicers	186
621	Retail Trade Managers	180
7452	Material Handlers	167
6611	Cashiers	166
6622	Store shelf stockers, clerks and order fillers	161
6411	Sales Representatives - Wholesale Trade (Non-Technical)	150
6215	Cleaning Supervisors	143
7322	Motor Vehicle Body Repairers	140
7245	Telecommunications Line and Cable Workers	133
8611	Harvesting Labourers	120
7219	Contractors and Supervisors, Other Construction Trades, Installers, Repairers and Servicers	119
8256	Supervisors, Landscape and Horticulture	112
6233	Retail and Wholesale Buyers	111
6623	Other sales related occupations	106
7292	Glaziers	96
7242	Industrial Electricians	88
6662	Specialized Cleaners	86
7294	Painters and decorators (except interior decorators)	85
1122	Professional occupations in business management consulting	78
4214	Early Childhood Educators and Assistants	76

⁹⁸ Only occupations with 75 or more positions are shown in the table.

Banff/Canmore Area Positions - 2015⁹⁹

NOC Code	Occupation	Positions
6641	Food Counter Attendants, Kitchen Helpers and Related Occupations	2,166
6212	Food Service Supervisors	1,442
6661	Light Duty Cleaners	869
6242	Cooks	445
6421	Retail Salespersons and Sales Clerks	302
6435	Hotel Front Desk Clerks	236
6441	Tour and Travel Guides	174
5254	Program leaders and instructors in recreation, sport and fitness	146
6442	Outdoor Sport and Recreational Guides	118
6453	Food and Beverage Servers	112
6241	Chefs	105
6622	Store shelf stockers, clerks and order fillers	97
631	Restaurant and Food Service Managers	93
6216	Other Service Supervisors	73
7281	Bricklayers	68
6671	Operators and Attendants in Amusement, Recreation and Sport	66
6681	Dry Cleaning and Laundry Occupations	64
6211	Retail Trade Supervisors	62
6663	Janitors, Caretakers and Building Superintendents	61
6611	Cashiers	54
6215	Cleaning Supervisors	46
7241	Electricians (Except Industrial and Power System)	35
7412	Bus Drivers and Subway and Other Transit Operators	33
621	Retail Trade Managers	32
6623	Other sales related occupations	30
7251	Plumbers	30
8253	Farm Supervisors and Specialized Livestock Workers	30
7282	Concrete Finishers	27
4214	Early Childhood Educators and Assistants	23
632	Accommodation Service Managers	22
2225	Landscape and horticulture technicians and specialists	20
721	Facility Operation and Maintenance Managers	18
9619	Other Labourers in Processing, Manufacturing and Utilities	18
1231	Bookkeepers	17
7611	Construction Trades Helpers and Labourers	17
6672	Other Attendants in Accommodation and Travel	16
6483	Pet Groomers and Animal Care Workers	15
7272	Cabinetmakers	14
7312	Heavy-Duty Equipment Mechanics	14
7445	Other Repairers and Servicers	13
8612	Landscaping and Grounds Maintenance Labourers	13
6682	Ironing, Pressing and Finishing Occupations	12
1414	Receptionists and Switchboard Operators	11
6213	Executive Housekeepers	10
6214	Dry Cleaning and Laundry Supervisors	10
6252	Bakers	10
7271	Carpenters	10
8431	General Farm Workers	10

⁹⁹ Only occupations with 10 or more positions are shown in the table.

The Q1 2015 Calgary and Area Employer Survey is based on responses to a telephone questionnaire conducted in January, February and March 2015 of Calgary and area employers with 100+ employees (large-sized employers). Following are the number of respondents from each industry sector.

Q1 2015 Survey Respondents

Industry	Number of Respondents
Mining & Oil & Gas	20
Construction	20
Manufacturing	20
Wholesale & Retail Trade	21
Transportation & Warehousing	20
Professional, Scientific & Technical Services	20
Health Care & Social Assistance	20
Accommodation & Food Services/Arts & Entertainment	20
Finance, Insurance, Real Estate & Leasing	20
Other	20
Total	201

The Q2 2015 Calgary and Area Employer Survey is based on responses to a telephone questionnaire conducted in April, May and June 2015 of Calgary and area employers with 50 - 99 employees (medium-sized employers). Following are the number of respondents from each industry sector.

Q2 2015 Survey Respondents

Industry	Number of Respondents
Mining & Oil & Gas	20
Construction	20
Manufacturing	20
Wholesale & Retail Trade	20
Transportation & Warehousing	20
Professional, Scientific & Technical Services	20
Health Care & Social Assistance	20
Accommodation & Food Services/Arts & Entertainment	20
Finance, Insurance, Real Estate & Leasing	20
Other	20
Total	200

The Q3 2015 Calgary and Area Employer Survey is based on responses to a telephone questionnaire conducted in July, August and September 2015 of Calgary and area employers with 10 - 49 employees (small-sized employers). Following are the number of respondents from each industry sector.

Q3 2015 Survey Respondents

Industry	Number of Respondents
Mining & Oil & Gas	20
Construction	20
Manufacturing	20
Wholesale & Retail Trade	20
Transportation & Warehousing	20
Professional, Scientific & Technical Services	20
Health Care & Social Assistance	20
Accommodation & Food Services/Arts & Entertainment	20
Finance, Insurance, Real Estate & Leasing	20
Other	20
Total	200

The Q4 2015 Calgary and Area Employer Survey is based on responses to a telephone questionnaire conducted in October, November and December 2015 of Calgary and area employers with <10 employees (micro-sized employers). Following are the number of respondents from each industry sector.

Q4 2015 Survey Respondents

Industry	Number of Respondents
Mining & Oil & Gas	20
Construction	20
Manufacturing	20
Wholesale & Retail Trade	21
Transportation & Warehousing	20
Professional, Scientific & Technical Services	20
Health Care & Social Assistance	20
Accommodation & Food Services/Arts & Entertainment	20
Finance, Insurance, Real Estate & Leasing	20
Other	20
Total	201

The 'Other' industry category includes a variety of companies from the remainder of the industry categories: Agriculture, Utilities, Information & Culture, Management of Companies, Administrative & Support Services, Educational Services, Other Services and Public Administration.

It should be noted that the method of sample selection provides a good cross-section of opinion. Nevertheless, given the size of the sample, the statistical reliability of the survey is limited, particularly when the data is reported by industry. The value of this survey, however, goes beyond the data captured by the questionnaire. The telephone interview allows companies to expand on their responses, which provides invaluable information and comments that cannot be measured quantitatively.

APPENDIX B

Employer Survey Occupation Results

Twenty-three per cent of the employers laid off approximately 3,661 workers in the three months prior to their survey.

Industry	Occupation	Number of Layoffs
Accommodation & Food Services/Arts & Entertainment	Food Attendants/Restaurant Helpers	6
	Operation Assistants	6
	Housekeepers	5
	Servers	5
	Cooks	1
	Front Desk	1
	Maintenance	1
	Not Specified	4
Subtotal		29
Construction	Labourers	227
	Project Managers	153
	Engineers	150
	Field	20
	Heavy Equipment Operators	12
	Drywallers	7
	Consultants	6
	Drivers	6
	Carpenters	5
	Designers	4
	Senior Project Managers	3
	Electricians	1
	Office	1
	Not Specified	445
Subtotal		1,040
Finance, Insurance, Real Estate & Leasing	Insurance Sales	18
	Real Estate Agents	4
Subtotal		22
Health Care & Social Assistance	Front Line Workers	28
	General Labourers	15
	Front Line Community Support Workers	5
	Administration	4
	Receptionists	3
	Social Workers	3
	Executive	2
	Support	2
	Manager of Shelter	1
	Outreach Worker	1
Subtotal		64

APPENDIX B

Industry	Occupation	Number of Layoffs
Manufacturing	Labourers	94
	Entry Level Manufacturing	18
	Plant Workers	9
	Assembly Line Manufacturing	8
	Shop	6
	Trades	6
	Marketing	3
	Welders	3
	Administrative	2
	Inside Sales	2
	Material Handlers	2
	Shop Supervisor	2
	Buyer	1
	Customer Service Representative	1
	Engineer	1
	Office Administration	1
	Parts Purchasing	1
	Prepress Operator	1
	Processing Specialist	1
	Procurement Manager	1
	Productivity Manager	1
	Quality Control	1
	Sales Engineer	1
	Senior Designer	1
	Not Specified	27
Subtotal		194
Mining & Oil & Gas	Contractors	1,306
	Field	368
	Field Drill Operators	40
	Engineers	33
	Accounting	25
	Operations	10
	Office-related Positions	6
	Administrative	5
	Environment	5
	Health & Safety	5
	Technical/Professional	5
	Graphic Designer	4
	Software Development	3
	Technical Sales Specialist	3
	Drillers	2
	Quality Assurance	2
	Consultant	1
	Engineering Manager	1
	Executive Assistant	1
	Project Administrator	1
	Shop Manager	1
	Not Specified	110
Subtotal		1,937
Other	Analysts	7
	Editorial Reporters	5
	Accounting	3
	Administration	2
	Customer Service Representative	1
	Developer	1
	Front Line	1
	Production	1
	Service	1
	Not Specified	2
Sub Total		24

APPENDIX B

Industry	Occupation	Number of Layoffs
Professional, Scientific & Technical Services	Field	40
	Shipping & Receiving	15
	Data Management	11
	Engineers	10
	Truck Driving	10
	Land Acquisition	8
	IT	7
	Designers	6
	Geomatics	4
	Labourers	4
	NDT Technicians	4
	Chemical Engineers	3
	Interior Design	2
	Marketing Analysts	2
	Office	2
	Survey Assistants	2
	Surveyors	2
	Accountant	1
	Architect	1
	Architectural Technologist	1
	Business Development	1
	Clerical	1
	Contractor	1
	Immigration Consultant	1
	Plant Supervisor	1
	Project Manager	1
	Not Specified	22
Subtotal		163
Transportation & Warehousing	Truck Drivers	32
	Manufacturing Technicians	5
	Finance	4
	Sales	4
	Mechanics	2
	Office	2
	Welders	2
	Contractor	1
	Inspector	1
	Recruiting & Payroll	1
	Taxi Driver	1
	Warehouse	1
	Not Specified	42
Subtotal		98
Wholesale & Retail Trade	Sales	39
	Automotive Service Technicians	24
	Boat Repair	5
	Clerks	3
	Cosmetics	3
	Equipment Sales	3
	Wholesale Sales	3
	Labourers	2
	Receptionists	2
	Administrative	1
	Drivers	1
	Greenhouse	1
	Landscaping	1
	Marketing Analyst	1
	Project Manager	1
Subtotal		90
Grand Total		3,661